

Departmental Aid User Group

March 2018

Topics

- News, Announcements, and Important Dates
- Reminders: Awarding in the Next Fiscal Year
- SAFM Enhancements for 2018-19
- Reminder: Recon Reports (UBI)
- Reminder: Cancel Package in Any Combination of Start, Processed, or Rejected
- Meetings: Upcoming Dates, Times, Locations
- Reminder: Getting Help
- Time Held for Your Questions

News, Announcements, and Important Dates

Calendar Item	Date
SAFM Open for Summer 18, Fall 18, J-term 19, Spr 19 entry	March 15, 2018
DA Page Open for Entry (for those not in SAFM)	March 15, 2018
Summer Tuition Calcs (waivers go from \$1 to tuit amt)	around April 16, 2018
Last Day to Get All Your Entries in SAFM for Summer	May 18, 2018
Summer Session 1 Begins	May 21, 2018
Last GA Interface to Oracle for FY2018	June 22, 2018 (approved in SAFM by 6/21/2018)
See Chart Below for Additional Informati	on Regarding Summer Dates
Fall Tuition Calcs (waivers go from \$1 to tuit amt)	July 6, 2018
Aetna Student Health Ins Website Opens	mid-July, specific date TBD
All Entries Should be Approved in SAFM for Fall 2018	July 17, 2018
Fall Term Charges Notification	approx. July 24, 2018
Fall Financial Aid Disburses	August 20, 2018
Fall Tuition Due Date	August 22, 2018
Fall First Day of Classes	August 28, 2018
Students w/Past Due or No Enrollment Cancelled (Fall)	September 3, 2018

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SIS - SA	FM	SIS – Dep	artmental Awarding (F	A) Pages	Oracle
Budget/Target	Academic	Financial Aid	Summer	Projected	Charge
Fiscal Year	Term	Aid Year	Award Type	Disb Date	Appears in
					Fiscal Year
		Tuition Awards			
2017-18	1186	2019	Tuition – Summer 1	May 18, 2018 -	2017-18
2018-19	1186	2019	Tuition – Summer 2	July 13, 2018 -	2018-19
		Stipend Awards			
2017-18	1186	2019	Stipends - June	May 23, 2018	2017-18
2017-18	1186	2019	Stipends - July	June 20, 2018	2017-18
2018-19 1186		2019	Stipends - August	July 23, 2018 -	2018-19

Reminders: Awarding in the Next Fiscal Year

- Please remember to rollover/setup your targets for the next fiscal year.
 - Navigation: Financial Aid > UVa Financial Aid > Awarding > Student Aid Funding Module
 >SAFM- Target Setup page
- If you award admitted applicants, please make sure to cancel their awards if they do not accept your offer of admission.
- To default your SAFM Fiscal Year, remember to change your Aid Year in User Default Tab 2 to the fiscal year you wish to use. Navigate to Set up SACR > User Defaults > User Defaults 2 tab.

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults	D
रहे User ID:	msh8n Name: Hai	ris,Megan S.			
SetID: Aid Year:	UVA01	Q Ur	iversity of Virginia		
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SAFM Enhancements for 2018-19

Upcoming Enhancement: Academic Category Defaulted

 To improve the accuracy of SAFM tuition award amounts and decrease data entry, on the SAFM Awarding page, once the term is selected from the drop down menu, the system will default the academic category and international fee check box (if applicable). This enhancement will be available when SAFM opens for 2018-19.

*Term *Acader	nic Category	Packaging Plan	Residency R	Ad eg Hrs I	ctual Enro Rch Hrs	ollment Form of	Study GRA Hrs	GTA Hrs	Acad Level	Study Agreement	Acad Load		-	+
1178 🗸 PhD, Y	ʻrs 4+ 🗾		✓ v	0.00	12.00	ENRL	0.0	0.0	L5		F	Internat	ional St	udent
Package S	Ca	ncel Package	Recalculate Package						Revers	e Fund Source				

Important Points to Keep in Mind

- If the student is not yet term activated for fall OR if the individual is still an applicant (not yet a student), the academic category and international student check box will NOT default. You will need to enter this information manually.
- Spring will assume the same information as fall.
- The system will only default the academic category once the term is selected from the drop down.
- The academic category will not update once you have saved and go out/come back in.
- The international student checkbox will be defaulted as checked or unchecked based on the
 information in SIS; the checkbox will remain editable for students and applicants; the user will
 be able to check or uncheck the box. If the user checks or unchecks the international student
 box, but it does not match what is in the system, there will eventually be a discrepancy between
 the amount in SAFM and the amount the student was charged.
- You will also notice that a new field of Acad Load has been added to the page.
 - **F** indicates that the student has an approved academic load of full-time.
 - **P** indicates that he student has an approved academic load of part-time. If the student is a Part-time student, the academic category of Part-time will be defaulted and you will then pick the part-time packaging plan.

		Find View All First 🕚 2 of 3 🕑 Last
*Term *Academic Category Packaging Plan	Actual Enrollment Residency Reg Hrs Rch Hrs Form of Study GRA Hrs	GTA Hrs Acad Level Study Agreement Acad Load 🛨 🛨
1178 V PhD, Yrs 4+ V	✓ V 0.00 12.00 ENRL 0.1	0 0.0 L5 F 🖉 International Student
Package Student Cancel Package	Recalculate Package	Reverse Fund Source

- In a few instances, >1 academic category have the exact same tuition rates. In those cases, we have combined the academic categories into one academic category:
 - Nursing Masters & DNP
 - o Curry Masters & PhD/EdD Yr 1-2
 - o Medicine Yr 1, 2, 3, & 4
- Because of the code changes, if you award summer in 2018 ("Summer 1" in FY2018), when you add the row to add the term On SAFM Student Awarding page, if you pull up a student in 2018 and then add another row to add the summer term, you will be immediately asked if you want to save (see below). This is due to our recent code changes and will only happen this year. It is only a warning, so you will just need to click OK.

IDENC AWARDS										
-						Total Financial Aid	\$10	,928.60		
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• If you select 1188, the academic category and international fall checkbox populate, you immediately decided to switch the term from 1188 to 1192 (via the drop down menu), you will get the following messages.

	Message	
ec	Expected enrollment needs to be changed. The Academic Level for the term has changed. (0,-1)	D
Message		
The student's ap	proved academic load has changed for 1192. ackage, change the academic category, and select a new pag	:kage. (01)
ОК		2 -1 -1

This is happening because the Acad Category and International Student fields already have a value in them; when you select the 1192 term, the values have changed and it displays the error messages. If this happens, you will need to click OK, then manually select the Acad Cat. and Packaging Plan OR go out and come back into the page without saving and start over.

Upcoming Enhancement: Health Insurance in 2018-19

- We do not have the "approved" health insurance rate yet. So, when you package a student, an "estimated" amount for the health insurance rates will populate as the award level amount for health insurance.
 - You can go ahead and award (package, cancel package, repackage, etc.) as normal without the finalized health insurance rate. But, you will not be able to move the health insurance award past start (defaulted to Start status and grayed out).

6	840000020800 AY GRAD Health Ins Subsidy Amt 2890.00 Notes					*Award Status Start 🗹 <						•		
	Organiz	tion Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse		
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ſ	2 31315	EN-Biomed Engr Dept	101194 - Epstein BME : 🗸	FA00011	101194	101 🔍		690.00	25.65	GRA 🗸			+	

- We will also ensure that health insurance cannot be interfaced from SAFM to the Departmental Award area.
- Once the rate has been approved (likely in April or May), the health insurance amounts will be updated and the Award Status box will open up.
- You will then be able to move the award through the workflow and it will interface from SAFM to the Departmental Aid area of SIS.

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 Note: The fund source amounts are updated based on the rounded % (25.65% to 26.00%; 74.35% to 74.00%).

Reminder: Recon Reports (UBI)

- Reminder to run these reports regularly. These reports are used to reconcile data in SAFM with enrollment data, residency, and citizenship status.
 - Navigate to UBI, then pull up SIS_FA_SAFM. Click on the Recon tab at the top.
 - SAFM reconciliation reports on that tab are entitled the Enrollment Discrepancy report (button) and the Award Discrepancy (button) report. Fixed rate schools: the Enrollment discrepancy report would not apply: run the Award Discrepancy report instead.

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Etudont/	Student System ID	• O	Acade	mic Plans	•	Award Num Name	•				
Acad/	University ID	• O	Acade	mic Group	•	Target Name	•	Clearing	Enrollment	Recalc	
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Reminder: Cancel Package in Any Combination of Start, Processed, or Rejected

- A question regarding this came up recently, so we wanted to review this with you.
- You will be able to cancel packages when awards statuses are in any combination of start, processed, or rejected *as long as no reversal is waiting to be processed*.
- Example: The wages were reversed. To be able to cancel the package; you must enter the offset (row #3) and move it through the workflow to Processed <u>before</u> the cancel package button will be available.

Package S	tudent Cancel	Line-GTA 10 Hours Package Recalcu	Jate Package	0.0 0.0	0 AFFL	0.0 10	<u>.0</u> 20	Reverse	Fund Source	ternational Student		
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Meetings: Upcoming Dates, Times, Locations

- Upcoming monthly DAUG Meetings:
 - Wednesday, 4/11/18, 3:30pm Location: Ruffner 206
 - We will not meet in May, June, or July; we resume meeting in August or September.

Reminder: Getting Help

• Access help from within SIS. Click "Help" link, in the search box type "SAFM" and uncheck Applicable. You can view SAFM training materials and quick guides.



• In the search box type "SAFM" and uncheck Applicable. You can view SAFM training materials and quick guides.

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Applicable		Currently departmental awarding in the SIS consists of the Student Aid Funding Module	e (SAFM) and Assign Departm	ental Award pages:
Results for: SAFM View filtered outline Departmental Atc Student Ald Funding Model (SAFM Working with targets	1)	 SAFM allows departments to track available funding and forecast aid for prospec of duplicate data entry in SIS, SAFM greatly improves reporting capabilities for a serves as the system of record through which reporting on graduate financial ai Departmental awards entered in the Assign Departmental Awards page interficence all Ledger (GL) and Grants Accounting (GA) modules. 	ctive and current graduate str all departments and central Ur d is obtained. ace financial aid award inform	idents. In addition to its eve niversity administration. The ation with both the Integrati

- Bookmark and visit the DAUG website: <u>http://sfs.virginia.edu/internal/deptaid</u>.
- Contact your School Admin/Local Expert via email or phone.

School/Unit	School Admin	Phone	Email
GSAS	Lloyd Banks	4-3919	lb3ne@Virginia.EDU
Curry	Katie Walker	3-4585	kwalker@virginia.edu
Engineering	Joan Wicks	4-4380	jew9s@virginia.ed
BIMS	Fay Miller	4-2217	fmiller@virginia.edu
Nursing	Adam Seid	4-0067	ads8n@Virginia.EDU
Architecture	Cynthia Keifer	4-6442	cgk4h@virginia.edu

- Attend these meetings regularly (the monthly DAUG meetings) which typically occur on the second Wednesday of the month at 3:30pm (except May, July, July).
 - We typically sends a meeting reminder. If you are not receiving these emails or know someone else who should be, please let us know.

- Send an email to <u>4help@virginia.edu</u>; please enter a **subject line of SAFM**. You do not need to copy anyone.
- 4help tickets are automatically routed:



- Please do not send emails to individuals in SFS and/or ITS directly. Sending your questions through 4help ensures that we are able to track the issues as well as analyze the types of questions you are sending. If someone is out of the office, others can help.
- We have seen very rare instances of the helpdesk incorrectly routing or incorrectly solving a ticket; IF this happens to you, let us know immediately so we can correct it and ensure it does not happen again.

Questions?