DAUG MEETING

Topics

- Important Dates
- SAFM 2019-20: Reminders
- New for SAFM in 2019-20
- SAFM Access
- Getting Help: Resources and Contacts

Important Dates

Calendar Item	Date
2019 Spring Health Insurance Spring Disbursement	March 1, 2019
SAFM/DA Open for 2019-20 (1196,1198,1201,1202)	March 14, 2019
SAFM/DA Open for Summer 2020	TBD; as soon as rates are confirmed
2019 Summer Tuition Calc'ed	Mid-April
Last Day to Get Entries in SAFM for Summer 19	Mid-May (tuit. shows as anticipated aid)
Finals Weekend (Graduation)	Friday, May 17 - Sunday, May 19, 2019
Summer Session	https://summer.virginia.edu/calendars
Last Day to Process Changes in SAFM for FY19	June 19, 2019
Last GA Interface to Oracle for FY2019	June 20, 2019 (morning)
2019 Fall Tuit Calc'ed (waivers go from $1 to amt)	July 5, 2019
Aetna Student Health Ins Website Opens	Mid July 2019
Fall Term Charges Notification	July 23, 2019 (GRAD, UGRD, LAW)
Fall Financial Aid Disburses	Aug. 19, 2019 (GRAD, UGRD, LAW)
Fall Tuition Due Date	Aug. 21, 2019 (GRAD, LAW2, UGRD)
Fall First Day of Classes	August 27, 2019
Students w/Past Due or No Enrollment Cancelled	September 3, 2019
Aetna Website Last Day to Enroll/Waive	September 18, 2019
Health Ins Subsidy Fall Disbursement	October 1, 2019
Health Ins Subsidy Spr Disbursement	TBD

SIS - SAFM		SIS – Departmental Awarding (FA) Pages			Oracle
Budget/Target **Fiscal Year**	Academic **Term**	Financial Aid **Aid Year**	Summer Award Type	Projected Disb Date	Charge Appears in **Fiscal Year**
		Tuition Awards			
2018-19	1196	2020	Tuition–Summer 1	May 10, 2019	2018-19
2019-20	1196	2020	Tuition–Summer 2	July 5, 2019	2019-20
		Stipend Awards			
2018-19	1196	2020	Stipends - June	May 23, 2019	2018-19
2018-19	1196	2020	Stipends - July	June 18, 2019	2018-19
2019-20	1196	2020	Stipends - August	July 23, 2019	2019-20

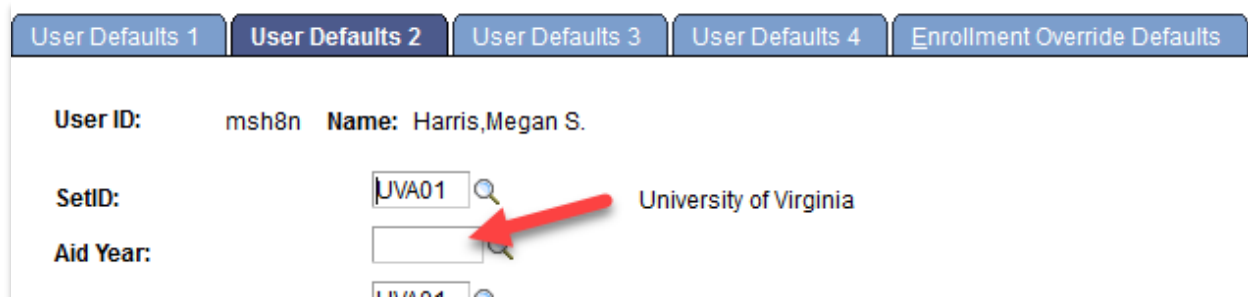| Stipend	Disbursement Date
for May 2019	April 23 2019
for June 2019	May 23, 2019
for July 2019	June 18, 2019
for August 2019	July 23, 2019
for September 2019	August 23, 2019
for October 2019	September 23, 2019
for November 2019	October 23, 2019
for December 2020	November 19, 2019
for January 2020	December 17, 2019
for February 2020	January 23, 2020
for March 2020	February 21, 2020
for April 2020	March 23, 2020
for May 2020	April 23, 2020
for June 2020	May 22, 2020
for July 2020	June 18, 2020
for August 2020	July 23, 2020

SAFM 2019-20: Reminders

Reminder: Rollover Targets
Setup your targets for 2019-20. Navigation: Financial Aid > UVa Financial Aid > Awarding > Student Aid Funding Module > SAFM- Target Setup. For detailed instructions, please see the February 2019 DAUG notes that will be posted on the DAUG website.

Reminder: Default SAFM Fiscal Year
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.
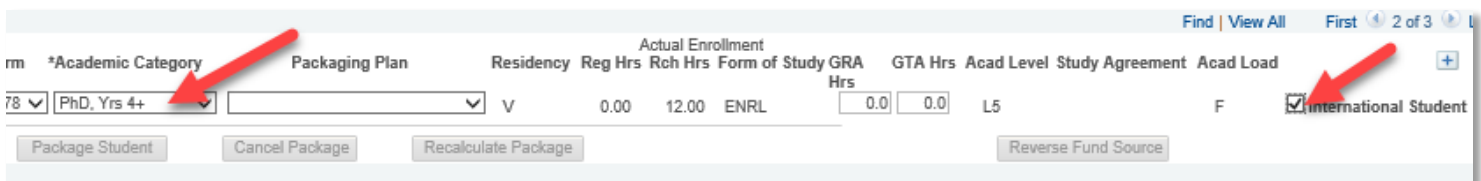
March 2019

Reminder: Awarding Admitted Applicants

We are opening SAFM for 2019-20 in March 2019, which means you will be able to award admitted applicants. If you do this, but the student does not accept your offer of admission make sure to cancel the awards you entered for them. *If you neglect to cancel their awards, but the student accepts an offer at another school within UVA, the funds will disburse to them.

Reminder: 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 defaults the academic category and international fee check box (if applicable). This enhancement was available when SAFM opened for 2018-19; so 2019-20 will be our second year with this functionality.

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.

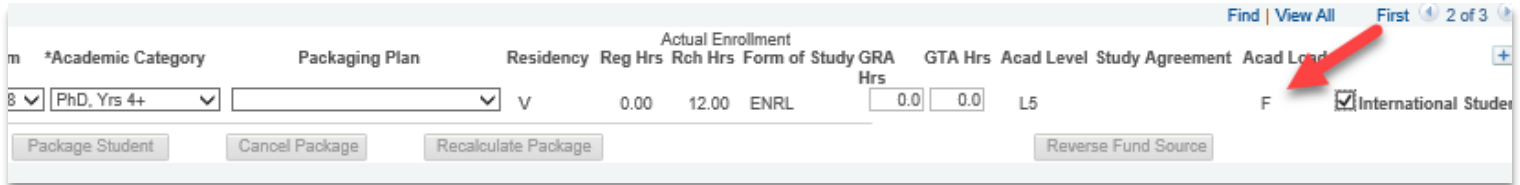Spring will assume the same information as fall.

The system will only default the academic category once term 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.

Field of Acad Load 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.

Reminder: Health Insurance
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. You will not be able to move the health insurance award past start (defaulted to Start status and grayed out).

Health insurance will not 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.

New for SAFM in 2019-20
Enhancement: Awarding Next Summer
When awarding SAFM for 2019-20, you will be able to enter awards in the following terms:
- 1196 Summer 2019
- 1198 Fall 2019
- 1201 J-term 2020
- 1202 Spring 2020
- 1206 Summer 2020 (Summer 1 only): OPENING AS SOON AS WE HAVE CONFIRMED RATES FOR 2020 SUMMER; WE HAVE THE FUNCTIONALITY IN PLACE BUT ARE AWAITING RATES

This means that you will soon be able to award for the full 2020 fiscal year.

Note: 1206 awards will not interface to the Departmental Aid page and will not be moved from Approved to Processed until a later date.

Enhancement: Prevent Users from Awarding Certain Combinations of Tuition Item Types in Summer
We modified SAFM to prevent users from awarding >1 tuition award that pays the same charge in the summer.

In the summer, you can award students in either Summer 1 (Fiscal Year 2019, term 1196) or Summer 2 (Fiscal year 2020, term 1196). This allows you to choose which fiscal year you wish for the charges to hit your PTAEOs.

But, you should only award a student a tuition award in either Summer 1 **or** Summer 2. Not both.

Exception: If you need to pay part of the student's tuition from a PTAEO in FY2019 and part from a PTAEO in FY2020, then you should use a limited package in Summer 1 and a limited package in Summer 2.

Enhancement: Health Insurance QLEs
In SAFM, we have a process that runs for a set amount of time in fall and spring that updates a field to indicate if a student has enrolled in or waived health insurance:
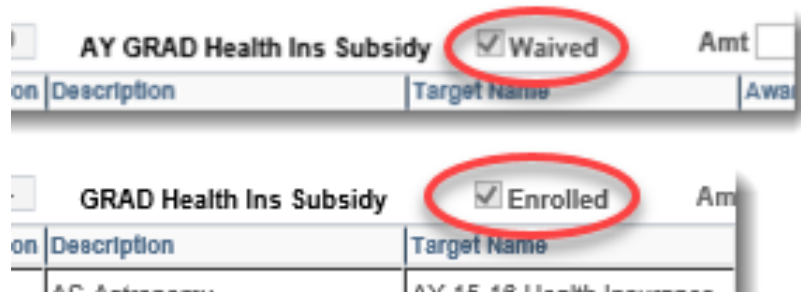
However, if the student has a Qualifying Life Event later (example: they age out of their parent's health insurance mid-year and wish to enroll in UVa's student health plan), the field indicating that the student waived/enrolled is not updated.

If you were to add a health insurance award AFTER our process stops running for the term, the field indicating that the student has waived or enrolled is not updated.

We have made changes so that the SAFM Awarding Page will more accurately reflect the student's health insurance acceptance status.

On the SAFM Student Awarding page for fall, spring, or summer: If the student enrolls and has been charged, the system will update the term in SAFM associated with the charge to enrolled and update the award amount. If the students waives health insurance, the health insurance checkbox will be set to waived. (If waived in fall, spring will also display as waived, unless the student had a QLE).

When you come into SAFM, if the checkbox has changed from enrolled to waived or waived to enrolled: reporting will mirror SAFM only AFTER you have saved the change in SAFM.

SAFM Access
Reminder: When new users submit an ESHARP request for the UV FA SAFM User role, they do not need to request separately access to UBI reporting (for the SAFM reports). They also do

not need to request separate access for the UV SF Viewer Departments role (which allows users to view the Student Finance Customer Accounts and Item Line Detail). All of this is included when with the UV FA SAFM User role.

Getting Help: Resources and Contacts

Training Materials & Quick Guides
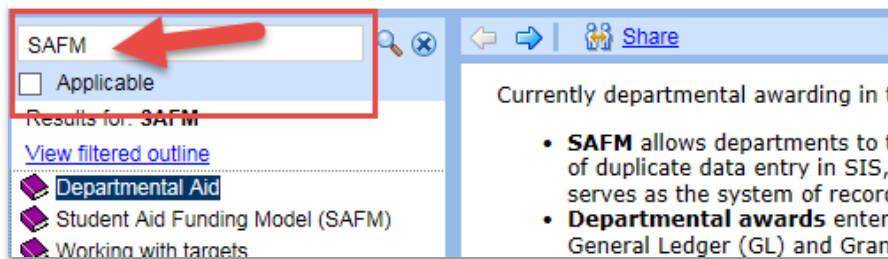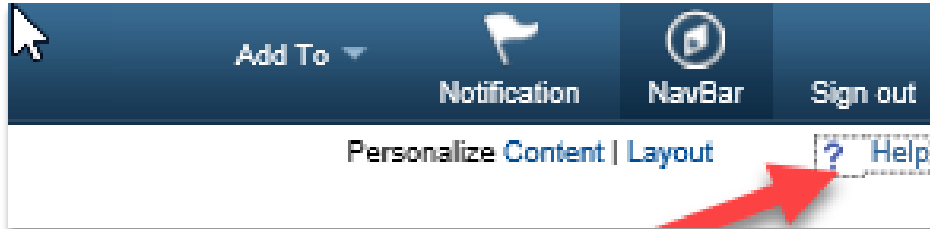
School Admins

School/Unit	School Admin	Phone	Email
Architecture	Carolyn Buchanan	4-6228	ceb4gw
BIMS	Fay Miller	4-2217	jff3f
Curry	TBD	TBD	TBD
Engineering	Joan Wicks	4-4380	jew9s
GSAS	Lloyd Banks	4-3919	lb3ne
Nursing	Adam Seid	4-0067	ads8n

DAUG Website

http://sfs.virginia.edu/internal/deptaid

DAUG Email List

If you are not already receiving these emails, let us know and we can add you.
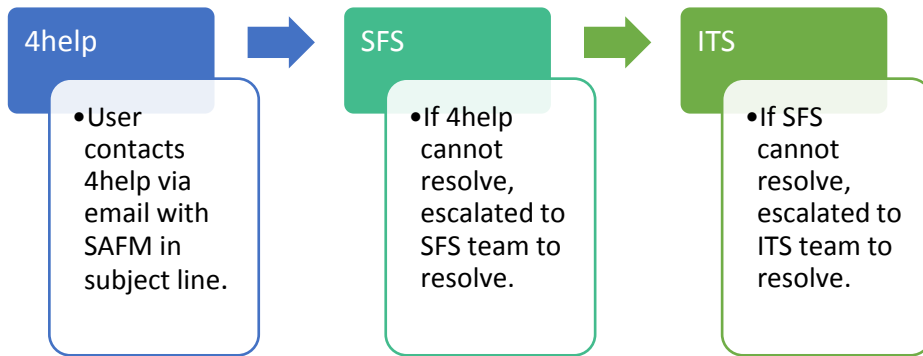
DAUG Meetings

Recurring meetings, second Wednesday of each month @ 3:30pm.

*We will meet once more before we break for summer. Our next meeting will be on April 10, 2019 @ 3:30pm. We will meet in Ruffner 206.

Additional Help

Send questions to 4help@virginia.edu; enter "SAFM" in subject line. Sending your questions to 4help@virginia.edu ensures that we are able to track the issues and analyze the types of questions asked.

4help	SFS	ITS
•User contacts 4help via email with SAFM in subject line.	•If 4help cannot resolve, escalated to SFS team to resolve.	•If SFS cannot resolve, escalated to ITS team to resolve.