UNIVERSITY of VIRGINIA

Departmental Aid User Group (DAUG)

November 2018

Topics

- Important Dates
- Reminder: SAFM Inactivated Past Years
- New Item Types
- Reminders: Health Insurance
- Reminder: Withdrawn Students
- SIS Responsibilities & Training + ESHARP
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- Reminder: Reversals vs. Cancel Package
- Reminder: Health Insurance in 2019-20
- Getting Help: Resources and Contacts

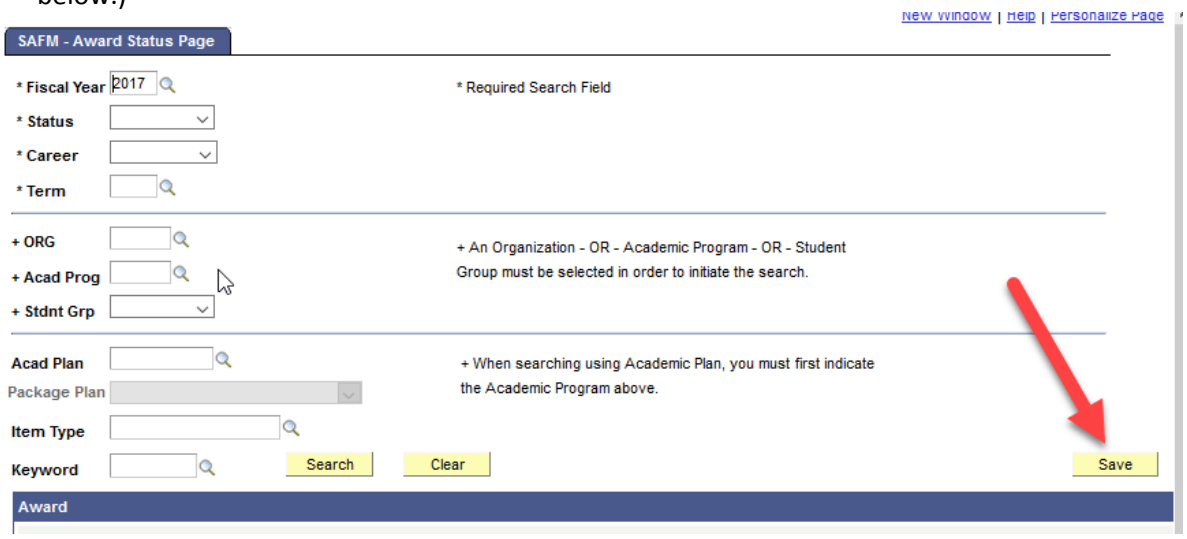
Important Dates

Calendar Item	Date
SAFM/DA Opened for 1186, 1188, 1191, 1192 Entry	3/15/18
2018 Summer Tuition Calc'ed	4/16/18
Last Day to Get Your Entries in SAFM for Summer 2018	5/18/18 (tuition shows as anticipated aid)
2018 Summer Session 1 Began	5/21/18
Last GA Interface to Oracle for FY2018	6/22/18 ("approved" in SAFM by this date)
2018 Fall Tuit Calc'ed (waivers go from $1 to tuit amt)	7/6/18
Aetna Student Health Ins Website Opened	mid-July
2018 Fall Term Charges Notification	7/23/18
2018 Fall Financial Aid Disbursed	8/20/18
2018 Fall Tuition Due Date	8/22/18
September stipend disbursement	8/23/2018
2018 Fall First Day of Classes	8/28/18
2018 Students w/Past Due or No Enrollment Cxl'ed (Fall)	9/4/18, 4pm
2018 SAFM/DA Closes for 2017-18 Entry	9/14/18
2018 Fall Health Insurance Appeal Deadline	9/28/18
October stipend disbursement	9/21/2018
2018 Fall Health Insurance Charges Posted in SIS	9/28/18
2018 Fall Health Subsidy Award Disbursement	10/1/18
November stipend disbursement	10/23/2018
2018 Fall Health Insurance Due Date	10/31/18
2019 Spring Tuition Calculates (waivers from $1 to tuit)	11/9/18
December stipend disbursement	11/16/2018
All Spring 2019 Entries Should be Approved	12/7/18 ("approved" in SAFM by this date)
2019 Spring Term Charges Notification	12/10/18 (BUSN MBA, UGRD, GRAD)
January stipend disbursement	12/17/2018

2019 J-Term	January 2 - 12, 2019
2019 Spring Financial Aid Disburses	1/4/19
2019 Spring Tuition Due	1/9/19
2019 Spring First Day of Classes	1/14/19
2019 Spring Students w/ Past Due, No Enrollment Cxl'ed	Mid-January 2019 (determined by SFS)
February stipend disbursement	1/23/2019
March stipend disbursement	2/22/2019
2019 Spring Health Insurance Spring Disbursement	3/1/19
SAFM/DA Open for 2019-20 Entry	Mid-March 2019
April stipend disbursement	3/22/2019
May stipend disbursement	4/23/2019

Reminder: SAFM Inactivated Past Years

- SAFM previous years (2018 and prior) have been inactivated. Do you have changes that need to be made for inactive past years? Email 4help@virginia.edu with SAFM in the subject line.
- Once inactive, you are still be able to view information on the SAFM Awarding Page, but not edit/make changes.
- On the Award Status page, if the year is active, the save button is available. If the year is inactive, the save button is not available. (There is one save button on the page, see screenshot below.)



New Item Types

We have added several new item types this fall that you will see in SAFM. SFS will provide guidance on how and when these item types should be used.

New Item Types	
640000110020 Architecture Schl Fall Only	640001010035 Nurs Scholarship Fall Only
640000110022 Arch Scholarship Spr Only	640001010037 Nurs Scholarship Spr Only
640000110021 Arch Scholarship J-term	640001010036 Nurs Scholarship J-term
640000110023 Arch Scholarship Summer 1	640001010038 Nurs Scholarship Summer 1
640000110024 Arch Scholarship Summer 2	640001010039 Nurs Scholarship Summer 2

Reminders: Health Insurance

Cancelling Health Insurance for Students that Waived

- Scenario: Department entered health insurance for student, moved it to Approved, and the award is now Processed. However, the student waived their health insurance. The department needs to reverse the entry and move it through the workflow.
- To find these students: UBI SAFM Award Status Report, look for health insurance in Error, Error Reason, "Subsidy award was declined when award status is in processed."
- Find the student's award on the SAFM Awarding page; reverse the award and move it through the workflow.

Health Insurance Life Events, Pro-rated Amounts

- If a student has a qualifying life event, they may be able to sign up for health insurance mid-year (after the enrollment period has ended.)
    - The student should email hardwaiver@virginia.edu to request enrollment into the Aetna Student Health plan within 30 days of losing current insurance coverage. Student Health will calculate the premium and complete the enrollment application.
    - A prorated amount will be calculated and added to the student's SIS account.
- You can enter the prorated amount in SAFM. The health insurance award/item type defaults to the standard amount, but you may change it. Note: If the student health insurance in SAFM displays as waived, but now you need to award the student health insurance, we will need to help you.
- You can find the actual charge on the student's account via the View Customer Accounts page in SIS.

Reminder: Withdrawn Students

- For students who have withdrawn, cancelled, or have moved to Affiliated Status, you need to make sure to back out their awards in SAFM.
- You can run the SAFM Discrepancy Reports to help you identify these students.
    1. Cancel Package
    2. Reverse any stipends, zero out the amounts, and move through the workflow
    3. Cancel health insurance, move reversal through the workflow (if the package was a qualified GRA or GTA package, make sure to zero out the GRA and GTA hours before reversing the health insurance. Note: IF you cancel the entire GRA/GTA package, and also wish to cancel the health insurance you will need to zero out the GRA/GTA hours.

SIS Responsibilities & Training + ESHARP

- For list of all SIS responsibilities and training required, navigate to the ITS website > Systems – Administrative > Student Information System (SIS) > SIS: Responsibilities and Training.
- General reminder: if you need to change your org access, you will need to submit an ESHARP request so that we can make the necessary row level changes in SAFM. Once you submit your request, a workflow passes the request to different levels of approval. We need these approvals to give you access to the org(s) in SAFM. To submit an esharp request:
    - Log in to ESHARP: https://cacs-web-prd.web.virginia.edu/esharp
    - Select Student Information System (SIS).
    - Select Request Add/Remove Access > New Request > Continue.

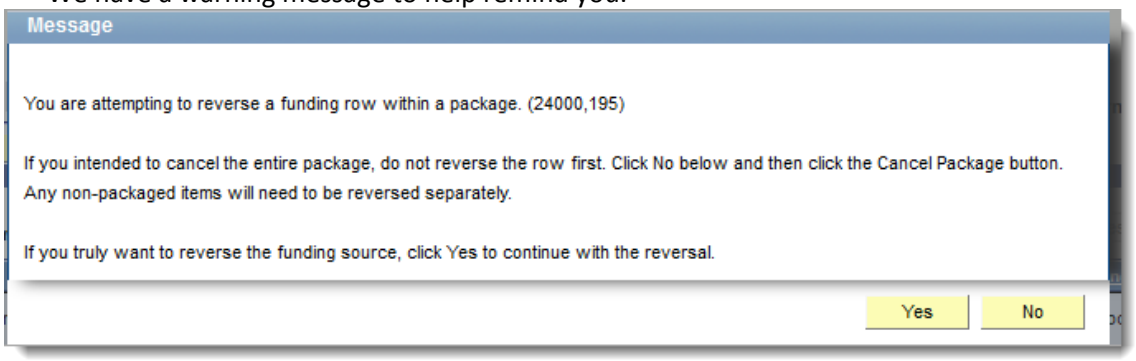
- Select the UV FA SAFM User GRAD <for your school> under Financial Aid.
- Complete the form; make sure that the action selected is "Add" and make sure you note which org(s) you will need access to and which org(s) you no longer need access to.
- Click continue and then Submit Request for Review

Reminder: Wages in Approved Go to Processed Overnight

- Wages are not interfaced to Oracle. However, the system moves wage awards in Approved to Processed nightly. This aids users in cancelling packages (awards must be in start, processed, or rejected for packages to be cancelled).
- Questions? Check with you School Admin regarding your school's business process regarding wages.

Reminder: Reversals vs. Cancel Package

- Do you have any questions about when you should reverse a fund source vs. cancel a package?
- If you just need to change the source of the funding (the target/PTAEO), then you should reverse the fund source and move the offset entry through the workflow. (For GSAS, this only applies when the funding has not been defaulted.)
- If the student truly needs a different package, then click Cancel Package and proceed.
- If you cancel a package by accident and save, you will need to move the cancelled package elements through the workflow to approved and then repackage.
- We have a warning message to help remind you:



Reminder: Health Insurance in 2019-20

- FYI - Even though the BOV approves graduate tuition next month, we do not typically have approved health insurance rates for the next year until the spring.
- We plan to have SAFM open in mid-March 2019. When you start awarding in March 2019:
  - Until we have the approved rate, 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).
  - 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.

Getting Help: Resources and Contacts

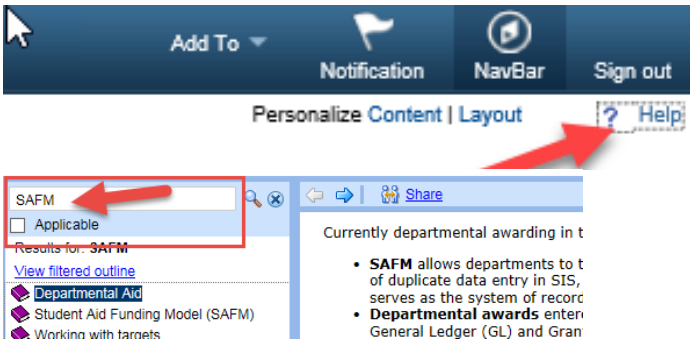
DAUG WEBSITE

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

DAUG EMAIL LIST

If you are not already receiving these emails, contact Sarah.

TRAINING MATERIALS & QUICK GUIDES

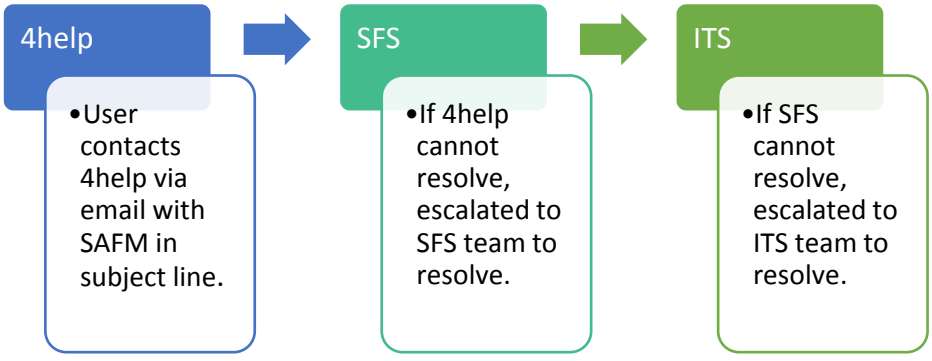


SCHOOL ADMINS

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	Carolyn Buchanan	4-6228	ceb4gw@virginia.edu

STILL NEED 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



Questions?