

Topics

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Introductions, Important Dates, News/Announcements from SFS

Calendar Item	Date
SAFM Open for Summer 2017 entry	3/16/2017, *interface from SAFM to DA started on 3/16
DA Page Open for Entry (for those not in SAFM)	3/16/2017
SAFM Open for Fall 2017, Spring 2018 entry	5/17/2017
Summer Tuition Calcs (waivers go from \$1 to tuit amt)	Starting 4/10/2017
Summer Session 1 Begins	5/15/2017 (see Academic Calendar)
Last Day to Get All Your Entries in SAFM for Summer	6/22/2017 (changes after this date will be applied to FY18)
Last GA Interface to Oracle for FY2017	6/23/2017
Fall Tuition Calcs (waivers go from \$1 to tuit amt)	7/7/2017
All Entries Should be Approved in SAFM for Fall 2017	7/17/2017
Fall Term Statements Created	7/18/2017
Fall Financial Aid Disburses	8/14/2017
Fall Tuition Due Date	8/16/2017
Fall First Day of Classes	8/22/2017 (see Academic Calendar)
Students w/Past Due or No Enrollment Cancelled (Fall)	8/25/2017
Aetna Student Health Ins Website Opens	7/17/2017
Health Insurance Appeal Deadline	9/22/2017
Health Insurance Charges Posted in SIS	9/29/2017
Fall Health Subsidy Award Disbursement	10/2/17
Fall Health Insurance Due Date	10/31/17
Spring Tuition Calcs (waivers go from \$1 to tuit amt)	11/11/2017
All Entries Should be Approved in SAFM for Spring 2018	around 12/8
Spring Term Statements Created	12/12/2017
J-Term 2018	1/2/2018 – 1/12/2018 (see Academic Calendar)
Spring Financial Aid Disburses	1/8/2018
Spring Tuition Due	1/10/2018
Spring First Day of Classes	1/17/2018 (see Academic Calendar)
Students with Past Due or No Enrollment Cancelled (Spr)	1/22/2018
Health Insurance Spring Disbursement	3/15/2018 (see Student Health website)
SAFM Open for Summer 2018 Entry	by late February 2018 (exact date TBD)

SAFM/DA Closed for 2017, 2016

- 2017 and 2016 are inactivated in SAFM. You are still able to view information, but not edit/make changes.
- If changes need to be made, email 4help@virginia.edu with SAFM in the subject line.

Reminder: 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: Run Discoverer Report FA_SAFM Award Status Report or 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.

Reminder: Health Insurance Life Events, Entering Pro-rated Amounts

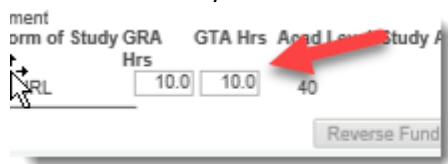
- If a student has a qualifying life event, they may be able to sign up for health insurance mid-year (after the enrollment period has ended.)
 - The student should email hardwaiver@virginia.edu to request enrollment into the Aetna Student Health plan within 30 days of losing current insurance coverage. 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.
- You can find the actual charge on the student's account via the View Customer Accounts page in SIS.

Discussion: SAFM Entries for Cancelled or Withdrawn Students

- For students for whom you have entered aid, then they withdraw or cancel: what are your next steps?
- We will be adding a User Edit to ensure if the student is not active (has no program), then their awards will not disburse. Would you want us to hold their stipends if the student cancelled or withdrawn?

Reminder: Withdrawn Students

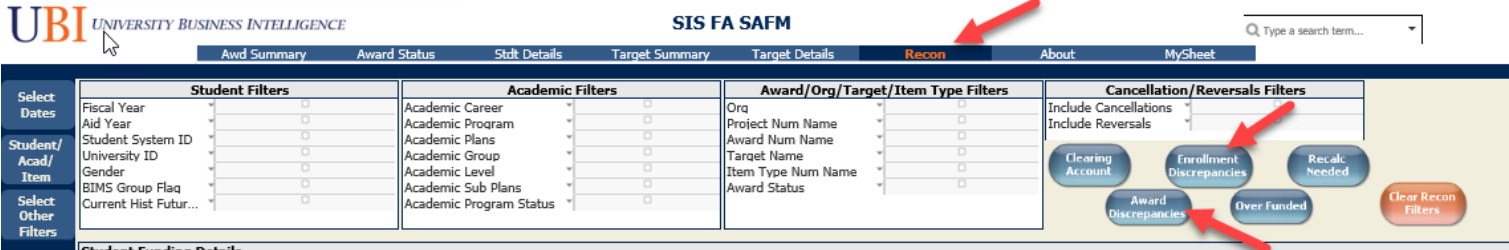
- For students who have withdrawn or cancelled, you need to make sure to back out their awards in SAFM. You can run the SAFM Discrepancy Reports (or SAFM Roster Report) to help you identify these students.
 1. Cancel Package
 2. Reverse any stipends, zero out the amounts, and move through the workflow
 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.



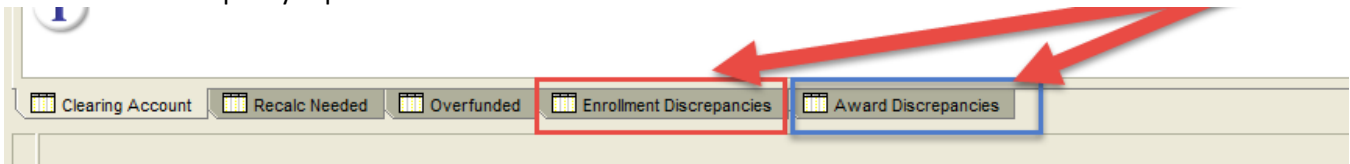
Reminder: Enrollment Discrepancy Reports (Discoverer & UBI)

- Reports used to reconcile data in SAFM with enrollment data, residency, and citizenship status.
- UBI:
 - Navigate to UBI, then pull up SIS_FA_SAFM.
 - Click on the Recon tab at the top.

- Two helpful SAFM reconciliation reports on that tab are entitled the Enrollment Discrepancy report (button) and the Award Discrepancy (button) report. (See the blue buttons below.)
- For fixed rate schools, the Enrollment discrepancy report would not apply. You should run the Award Discrepancy report instead.



- Discoverer:
 - Pull up the SAFM workbook FA_SAFM Reconciliation Reports.
 - Two helpful SAFM reconciliation reports within that workbook are entitled the Enrollment Discrepancy report (tab) and the Award Discrepancy (tab) report.
 - For fixed rate schools, the Enrollment discrepancy report would not apply. You should run the Award Discrepancy report instead.



New SAFM Quick Guide: Understanding PATEO Validation

- We have a new SAFM Quick Guide on [using PATEOs in SIS](#) that will be posted on the DAUG website soon.
- Tip: A very helpful UBI report that gives you a lot of information about a PATEO at a glance is the UBI GA Reference Report.

SAFM Reporting: Reminder, Transition to UBI

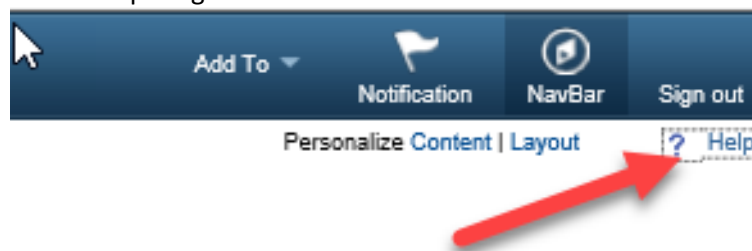
- Reminder: SAFM and DA reports are transitioning to UBI.

Meetings: Upcoming Dates, Times, Locations

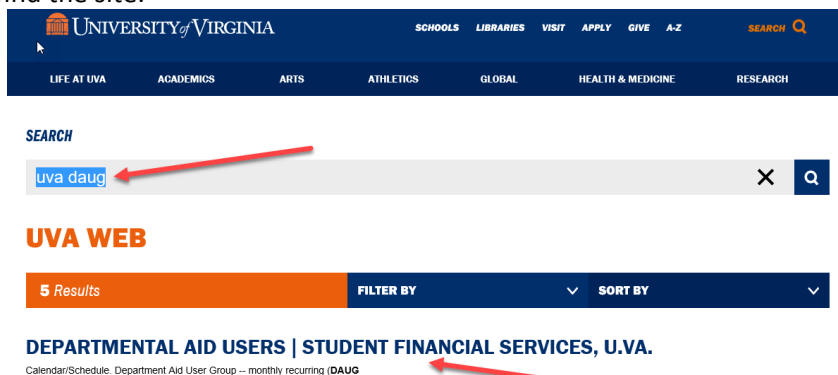
- Upcoming monthly DAUG Meetings:
 - Wednesday, 11/8/17 Location: Ruffner 206
 - Wednesday, 12/13/17 Location: Ruffner 206
 - Wednesday, 1/10/17 Location: Ruffner 206
 - Wednesday, 2/14/17 Location: Ruffner 206
 - Wednesday, 3/13/17 Location: Ruffner 206
 - Wednesday, 4/11/17 Location: Ruffner 206

Reminder of How to Get Help; Time Held for Q&A

- 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.



- Bookmark and visit the DAUG website: <http://sfs.virginia.edu/internal/deptaid>. Regularly updated and includes these and other DAUG meeting notes, important dates, links to quick guides, etc. Note: You can also search on the UVA website to find the site:



- Contact your School Admin/Local Expert via email or phone.

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

- Attend the monthly DAUG meetings. These typically occur on the second Wednesday of the month at 3:30pm, usually in Ruffner or Bavaro.
- Send email to 4help@virginia.edu, please use **subject line: "SAFM"**. You do not need to copy anyone.
- 4help tickets are automatically routed: once you send the email, the help desk routes it to SFS. If SFS is unable to resolve/it is a true system issue, it is then escalated to the Financial Aid team in ITS.
- We kindly ask that you please do not send emails to individuals in SFS 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. Additionally, if someone is out of the office, your email is routed to others who 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.

Time Held for Q&A

Questions?

