DAUG MEETING

Topics

- Important Dates
- Campus Experience
- SAFM/DA Closed for 2018-19
- Reminder: Tasks in SAFM (PTAEO)
- Reminder: Enrollment Discrepancy Reports (UBI)
- Reminder: Health Insurance
- Financial Strategic Transformation
- Recent SAFM Fixes & Enhancements
- Getting Help: Resources and Contacts

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Important Dates

Calendar Item	Date
2019 Fall Health Insurance Charges Placed in SIS	September 27, 2019
2019 Health Insurance Subsidy Fall Disbursement	October 1, 2019
2019 Fall Health Insurance Due Date	October 31, 2019
2020 Spring Tuition Calcs (waivers from $1 to tuit)	November 8, 2019
2020 Spring Entries Should be "Approved" in SAFM	December 6, 2019
2020 Spring Financial Aid Disburses	January 6, 2020
2020 Spring Tuition Due	January 8, 2020
2020 Spring First Day of Classes	January 13, 2020
2020 Health Insurance Subsidy Spring Disbursement	January 15, 2020
2020 Spring Students w/ Past Due, No Enrlmnt, Cxl'ed	January 21, 2020
SAFM/DA Open for 2020-21 Entry	Mid-March 2020

Stipend	Disbursement Date
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

Campus Experience

- Has anyone had any student feedback regarding the new student user interface?
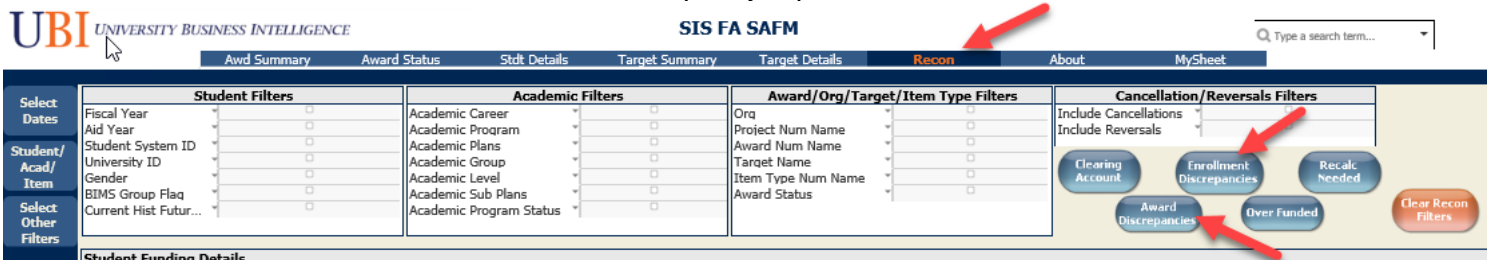
SAFM/DA Closed for 2018-19

- 2018-19 SAFM inactivated. You are still able to view information, but not edit/make changes.
- Changes? Email 4help@virginia.edu with SAFM in the subject line.

Reminder: Tasks in SAFM (PTAEO)

- This occasionally comes up from time to time, so we just wanted to remind everybody: for all tasks in SIS, they must be 8 or fewer characters.

Reminder: Enrollment Discrepancy Reports (UBI)

- These are 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.

Reminder: Health Insurance

Charges Posted

- UVA posted the Aetna Student Health Insurance plan annual premium of $2,814 to the SIS accounts of students who enrolled, failed to submit adequate documentation, or whose health plans were determined not to provide comparable coverage.

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.

SIS FA SAFM Health Subsidy Action Report

- In UBI, there is a "SIS FA SAFM Health Subsidy Action" report. This report identifies students who have enrolled in the student health plan and have a health subsidy award in SAFM, but the award is not in the processed status. Please run this report and make sure to move your students' awards 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 award a subsidy for the QLEs. The health insurance award/item type defaults to the amount charged on the account.
- You can find the actual charge on the student's account via the View Customer Accounts page in SIS.
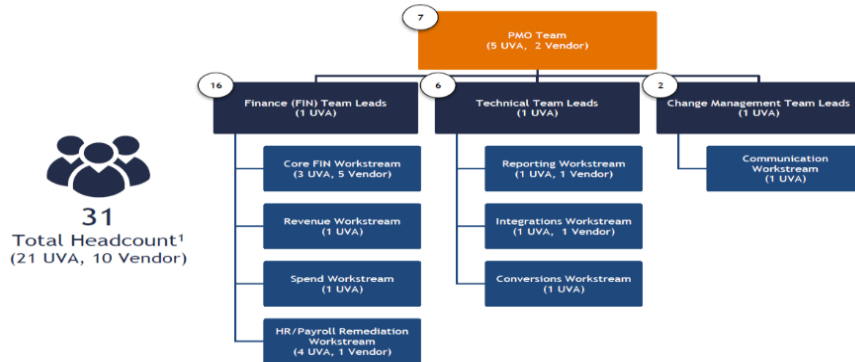
Financial Strategic Transformation

Quick Overview

The project has named high level team leaders

One team is working on the FDM (Financial Data Model; aka Chart of Accounts)

There will be only one ledger, the general ledger in WorkDay

We will be in touch with each school at the appropriate time regarding how this will impact SAFM

More information here: https://financetransformation.virginia.edu/

Recent SAFM Fixes & Enhancements

Fixes > **Completed**

n/a

Fixes > **In Process**

Prevent Issues Associated with Adding Additional Fund Source Rows

For the first time, we were seeing issues with users attempting to add fund source rows at unusual times. We modified SAFM to prevent users from being able to do this in SAFM.

Enhancements > **Completed**

n/a

Enhancements > **In Process**

SAFM 2019/20 Enhancements - Int'l Student Box Unchecked to Checked, Display Pop-up, Allow Recalc

Note: On the discrepancy report, we identified students who were needed to be recalc'ed. However, when you went into the Student Awarding page to recalc them, you had to click save before you would get the message instructing the user to recalc; upon save, the recalc button

was available. We want to change this as the user may not know that they have to click save in order to recalc. When the user comes into the page, a pop-up should display and they should be able to recalc at that time.
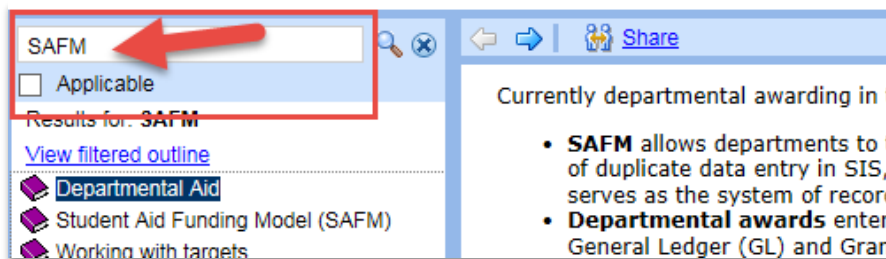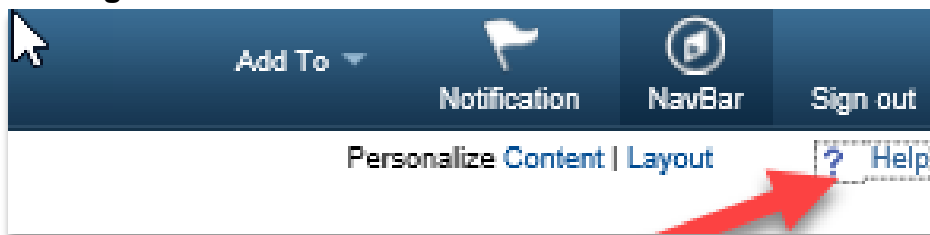
If international student checkbox is not checked, and the student has been charged the fee, the system checks the international student box and sets the recalc flag. At that time, display pop-up message if the user needs to recalc; allow user to recalc.

Default New ARG Academic Categories that Include Design Tech. Fee
Students in Architecture can be defaulted/awarded with the "MA/MS" academic category. However, the amount set up for the MA/MS academic category does not include the design tech. fee permutations. So, the amount in SAFM will not match what the student is truly charged.
We will add additional academic categories to the setup and then modify SAFM so that the appropriate academic category based on what the student is being charged will be defaulted in SAFM.

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	Dana Stanley	4-7161	dfb6n
Engineering	Joan Wicks	4-4380	jew9s
GSAS	Lloyd Banks	4-3919	lb3ne
Nursing	Julie Kusnerik	4-1978	jak8bz
Batten	Cindy Moore	2-2033	chm3b

DAUG Website

http://sfs.virginia.edu/internal/deptaid
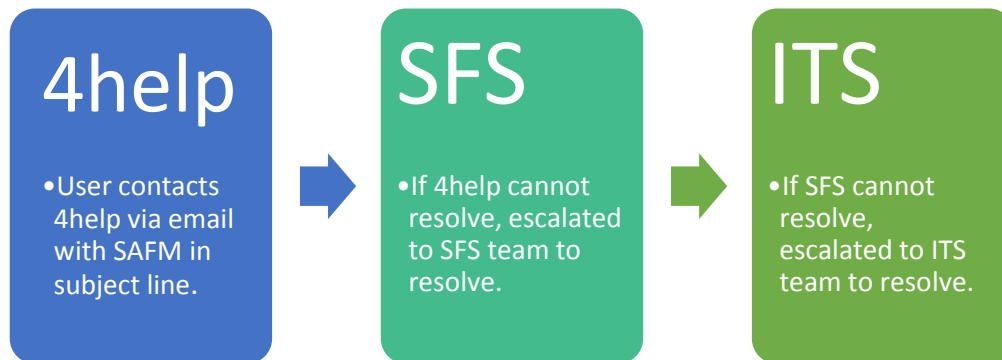
DAUG Email List
Users are added to this list once they are granted the SAFM role. If you know of someone who should be receiving these emails but is not, please let us know; we will add them.

DAUG Meetings
Recurring meetings (typically August – April), second Wednesday of each month @ 3:30pm.

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.

Questions?