DAUG Meeting, September 2017

Topics

- Introductions, Important Dates, News/Announcements from SFS
- General Health Insurance Updates
- Reminder: Entering Health Insurance in SAFM
- Reminder: Cancelling Health Insurance in SAFM for Students Who Waived
- SAFM Issue, Corrected: Adding Blank Award Elements before Packaging
- New ENG/ENGR Academic Categories
- Reminder: Tasks in SAFM
- Reminder: Awards in Error
- Reminder: Cancel in Start, Processed, or Rejected
- SAFM Reporting: Reminder, Transition to UBI
- SAFM/DA Closing for 2017
- Meetings: Upcoming Dates, Times, Locations
- Reminder: How to Get Help

Introductions, Important Dates, News/Announcements from SFS

- Important dates for 2017-18: http://sfs.virginia.edu/internal/deptaid
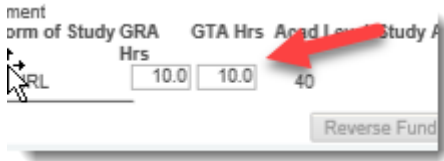
General Health Insurance Updates

- Charge is placed on students' accounts because:
  - they enrolled in the University's student health insurance program, administered by Aetna,
  - they took no action to resolve their outstanding SIS To-Do List item requiring them to enroll or to obtain a waiver based on other qualifying insurance coverage, or
  - the insurance waiver they submitted did not meet the requirements set forth by UVA.
- Students may receive an additional email from Student Financial Services about activity on their student account regarding this charge.
- Graduate students receiving the health insurance subsidy from their department do not need to make payment as the subsidy will pay the charge in SIS. (FYI - if the student is uncertain whether they are receiving a health insurance subsidy, they are told to contact their school/department directly.)
- Health insurance awards disburse on Oct 2.

Reminder: Entering Health Insurance in SAFM

- Reminder: In SAFM, grad health is added when the package student button is pushed, but it is NOT in the package. This was intentional so that when the package is cancelled, the health insurance is not automatically cancelled.
- Health insurance item types are disbursable item types that only pay health insurance charges owed on students' accounts.
- You are able to enter any amount (but the standard rate will auto-populate). The standard rates are:
  - Academic Year Health Subsidy Amount - $2,690.00
  - Spring Only Amount - $1,666.00
- You are able to cancel the health insurance award regardless of whether the student has accepted the insurance unless the student is in a qualified GRA/GTA package.

- You should cancel a health award the same way you cancel stipends (zero out the amount and move the reversal through the workflow).
- 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.

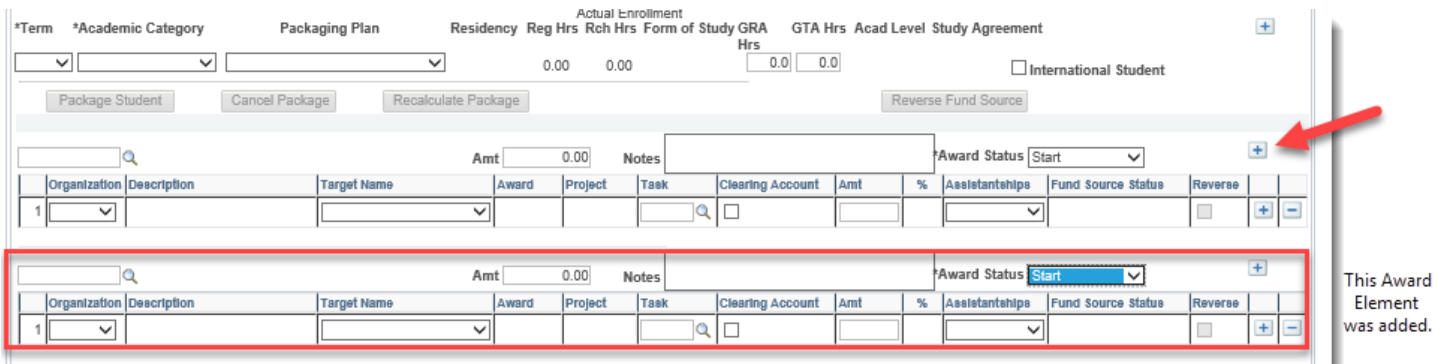- "Enrolled" or "Waived" – these will be visible/checked to indicate if the student enrolled or waived.

Reminder: Cancelling Health Insurance in SAFM for Students Who 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.

SAFM Issue, Corrected: Adding Blank Award Elements before Packaging

- We sent out an email about this. We asked that you do not add blank award elements before packaging a student. If you did, an award element that was supposed to be in the package went missing.
- **We have corrected this issue.** If you add blank awards before you package, award elements don't disappear.
- Example of the issue: Before packaging the student, I added a blank award element (by clicking on the + button, see red arrow):

- Then, I packaged the student with the Qualified GRA/GTA 100% Fall package. This package contains four awards: Wages, TuitRem & Comp Fees, Tuition Adjustment, and Grad Health. But, as you can see below, an award element (TuitRem & Comp Fees) is missing. It is missing because a blank award element was added *before* the student was packaged.

- Note: If you accidentally added blank award elements before the student was packaged – and item types were missing - cancel and repackage the student.

New ENG/ENGR Academic Categories

- We have added the following academic categories to SAFM:
  - ENG: PhD, Yrs 1-3 Off Grounds, PhD, Yrs 4+ Off Grounds, Full Time Masters Off Grounds
  - ENGN: PhD 4+ Off Grounds, Full Time Masters Off Grounds
- You can use these for the NIA students.

Reminder: Tasks in SAFM

- For all tasks in SIS, they must be 8 or fewer characters.

Reminder: Awards in Error

- Have noticed some awards in Error for a long time, so we wanted to go over Errors/how to correct them.
- Once you set the award to Approved, the system will pick up the awards & move them to Processed or Error.
- Errors happen at the award or fund source (PTAEO) level.

- SAFM errors are resolved by fixing the underlying issues: awards re-entered on the correct career, modifying the end date of the PATEO, etc. The system will continue, each night, to attempt to pick up items that are in Error. If the issue has been resolved, the award will then process.
- If a PATEO error cannot be fixed, you may choose to change the PATEO to a different PATEO.
- When the award status is set to "Error" all designated data entry fields including fund source fields are greyed and not available to you for that award except the status field at the award level.
- When the award status is set to "Error", the only available value for you to set on the status at the award level will be "Start" from "Error". By switching to "Start", data entry fields will be available for all fund sources under that award.
- **IMPORTANT** → Please make sure you regularly check for and take steps to correct awards in error by running the SAFM Award Status report (in UBI or Discoverer until the end of December).
- Additional questions? See the quick guide available for errors (can be found on DAUG website).

Reminder: Cancel in Start, Processed, or Rejected

- Based on some questions we have seen from you all via 4help, wanted to review how you cancel packages.
- You are able to cancel packages when awards statuses are in any combination of the following award statuses:
    - Start,
    - Processed, *or*
    - Rejected <u>as long as no reversal is waiting to be processed</u>.
- You cannot cancel a package with award statuses in statuses other than start, processed or rejected.

SAFM Reporting: Reminder, Transition to UBI

- Reminder: SAFM and DA reports are transitioning to UBI.
- The planned sunset for Discoverer SIS reporting: December 31, 2017.

SAFM/DA Closing for 2017

- We will be closing SAFM for 2017 on Sept. 15.

Meetings: Upcoming Dates, Times, Locations

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

Reminder: How to Get 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.
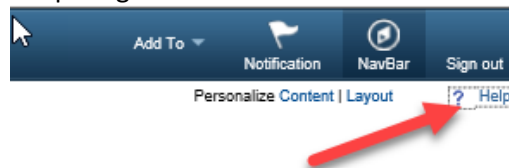
- Bookmark and visit the DAUG website: http://sfs.virginia.edu/internal/deptaid. Regularly updated and includes these and other DAUG meeting notes, important dates, links to quick guides, etc. Note: You can also search on the UVA website to find the site:
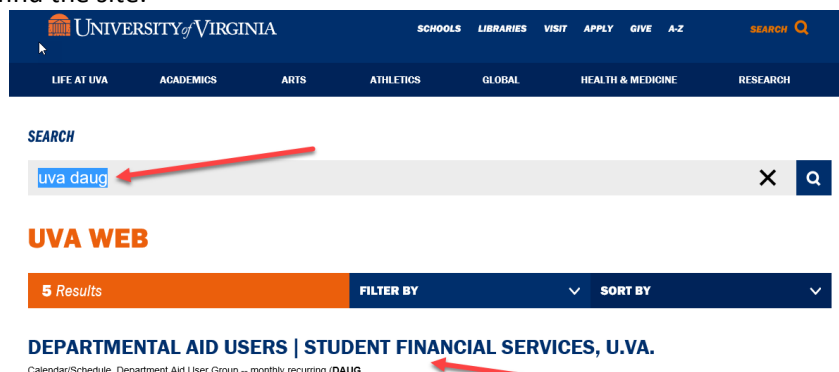
- Contact your School Admin/Local Expert via email or phone.

School/Unit	School Admin	Phone	Email
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	TBD	4-6442	tbd

- Attend the monthly DAUG meetings. These typically occur on the second Wednesday of the month at 3:30pm.
- 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.