September 2019

DAUG MEETING

Topics

- Important Dates
- Campus Experience
- Reminder: Tasks in SAFM (PTAEO)
- Reminder: Enrollment Discrepancy Reports (UBI)
- Reminder: Awards in Error
- Recent SAFM Fixes & Enhancements
- Getting Help: Resources and Contacts
- Team News

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Important Dates

Calendar Item	Date
SAFM/DA Open for 2019-20 (1196,1198,1201,1202)	March 14, 2019
2019 Summer Tuition Calculated	Mid-March 2019
Last Day to Get Entries in SAFM for Summer 19	Mid-May 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 FY19	June 20, 2019 (morning)
2019 Fall Tuition Calculated	July 5, 2019
Aetna Student Health Insurance 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
2019 SAFM/DA Closes for 2018-19 Entry	September 16, 2019
2019 Fall Health Insurance Appeal Deadline	September 16, 2019
Aetna Last Day to Enroll/Waive for 2019 (contact student health)	September 19, 2019
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)	Early November 2019
2020 Spring Entries Should be "Approved" in SAFM	Early December 2019
2020 Spring Financial Aid Disburses	Early January 2020
2020 Spring Tuition Due	Early January 2020
2020 Spring First Day of Classes	January 14, 2020

2020 Health Insurance Subsidy Spring Disbursement	January 15, 2020
2020 Spring Students w/ Past Due, No Enrlmnt, Cxl'ed	Mid-January 2020 (determined by SFS)
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

If you have questions about how you should key wages in SAFM, please contact your School Admin as each school may have a different business process. Wages are keyed into SAFM for informational purposes only. They are not communicated to any other systems.

From		To	Pay Date
5-Aug	1	18-Aug	23-Aug
19-Aug	2	1-Sep	6-Sep
2-Sep	3	15-Sep	20-Sep
16-Sep	4	29-Sep	4-Oct
30-Sep	5	13-Oct	18-Oct
14-Oct	6	27-Oct	1-Nov
28-Oct	7	10-Nov	15-Nov
11-Nov	8	24-Nov	29-Nov
25-Nov	9	8-Dec	13-Dec
9-Dec	10	22-Dec	27-Dec
23-Dec	11	6-Jan	10-Jan
6-Jan	12	19-Jan	24-Jan
20-Jan	13	2-Feb	7-Feb
3-Feb	14	16-Feb	21-Feb
17-Feb	15	1-Mar	6-Mar
2-Mar	16	15-Mar	20-Mar
16-Mar	17	29-Mar	3-Apr
30-Mar	18	12-Apr	17-Apr
13-Apr	19	26-Apr	1-May
27-Apr	20	10-May	15-May
11-May	21	24-May	29-May
25-May	22	7-Jun	12-Jun
8-Jun	23	21-Jun	26-Jun
22-Jun	24	5-Jul	10-Jul
6-Jul	25	19-Jul	24-Jul
20-Jul	26	2-Aug	7-Aug

Campus Experience

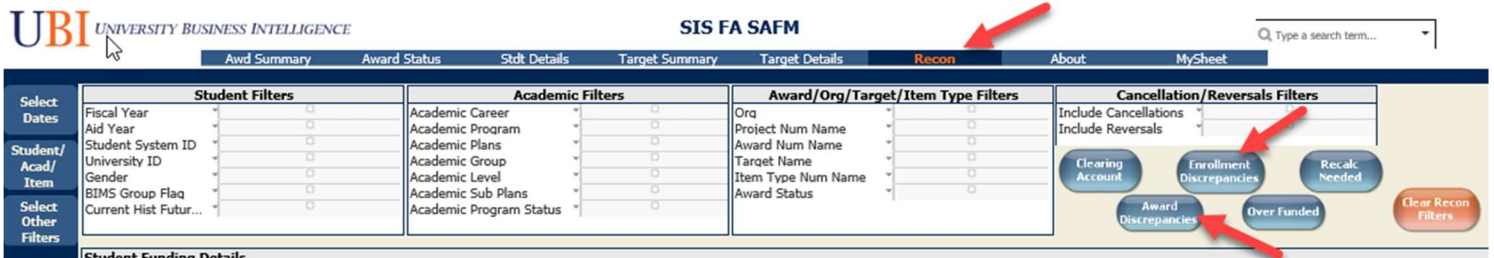- Please see the separate "Campus Experience" document for further information (regarding the Financials area). We will distribute the document via email and post it on the DAUG website.

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: Awards in Error

- We wanted to quickly review 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).
- Additional questions? See the quick guide available for errors (can be found on DAUG website).

Recent SAFM Fixes & Enhancements

Fixes	Completed

n/a

Fixes	In Process

Prevent Issues Associated with Adding Additional Fund Source Rows
Note: This was incorrectly listed under "Fixes>Completed" at our last DAUG meeting. This is a fix we are still working on and has not yet been completed.
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.

Example 1: User entered stipend award and fund source row and moved to ready. Then, the user added an additional fund source row ≠ overall award amount and saved. Then, school admin moved award to approved via the award status page. This caused issues when the award interfaced to the departmental awarding page (since the sum of the PTAEO amounts ≠ overall award amount). **Fix: Prevent users from saving fund source rows when the award is in In Review, Ready, Approved, Error, or Processed.**

Example 2: As you can see, the award status is rejected, but the fund sources are a combination of processed, ready, and rejected. There was a very specific series of steps that ultimately created this issue, but the problem started when the user added a fund source row after the cancelled award was in the approved status. With cancelled packages, once the cancelled award is moved to approved and saved, the user can no longer change the award status. However, once this user added an additional fund source row, the system allowed the user to change the award status. Then the user performed a specific combination of actions which included moving the award to different statues (ready or rejected), entering additional fund

source rows, entering PTAEO information for some of the rows, and saving. **Fix: Once award is in approved status, if user enters a row, the award status will not be editable.**

| 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. There are three scenarios:
- MA/MS students who are not charged the MA/MS rate with no design technologies fee at all. (We are already accommodating this scenario in SAFM.)
- MA/MS students who are charged the MA/MS rate with a high design tech. fee. Students charged this fee are in the following plans; BS, MAR, LAND MLAR.
- MA/MS students who are charged the MA/MS rate with a low design tech. fee. Students charged this fee are in the following plans: LAN BUEP, PLAN MUEP, UNDAR ARU.

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
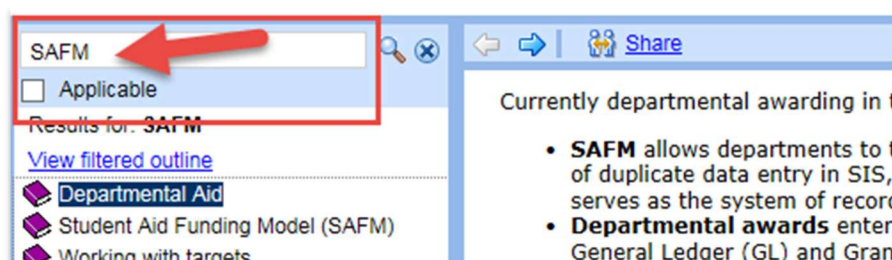
School Admins

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

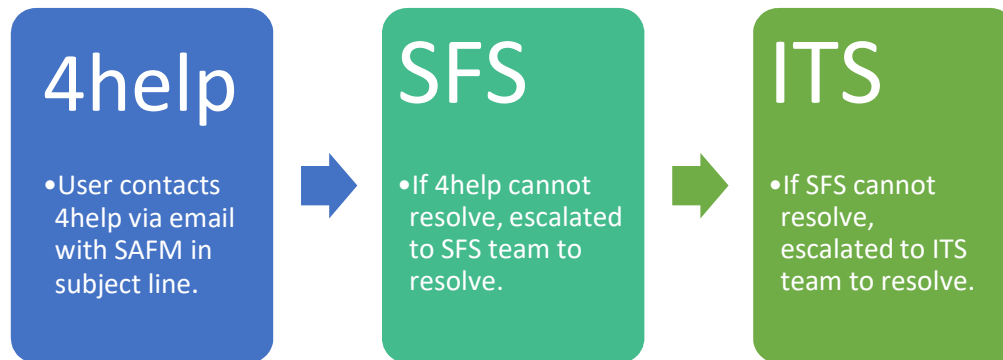http://sfs.virginia.edu/internal/deptaid

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.

Team News

- After five years as the ITS Business Systems Analyst for SAFM, Meg Harris will be leaving to pursue another opportunity at the University. Her last day in ITS will be September 13, 2019.
- SAFM will continue to be fully supported; please continue to send all questions to 4help@virginia.edu.

Questions?