

SAFM SCHOOL ADMIN MEETING

Invited

Individual(s)	Department or School	Attending
C.Elzey, M.Harris	ITS	yes
S.Doran, A.Nolasco, D.Davis	SFS	yes
C.Buchanan	Architecture	yes
F.Miller	BIMS	yes
D.Stanley	Curry	no
J.Wicks	SEAS	yes
L.Banks	GSAS	yes
J.Kusnerik	Nursing	yes
C.Moore	Batten	no

Topics

- Check-in
- Financial Strategic Transformation
- Important Dates & DAUG Notes
- Summer 2019
- SAFM Fixes & Enhancements
- ESHARP Workflow
- Getting Help: Resources and Contacts



Check-in

- We have some items to review with you, but primarily, we wanted to check-in with you.
- How has summer awarding been going? How has fall/spring awarding been going?

Financial Strategic Transformation

- You can find out more about the FST project via the [Online Finance Community](#).
- The chart of accounts (CoA) will be redesigned.
- SAFM/departmental awarding will be majorly impacted by the Finance Strategic Transformation.
- Prior to these impacts, we will be focusing on keeping SAFM stable; we do not plan to make any major changes to SAFM at this point.

Important Dates & DAUG Notes

- Important dates and notes from the previous DAUG meetings are posted on the [DAUG website](#).
- **Note: Last day to process changes in SAFM for FY19 is June 19, 2019.**
- If you have been unable to attend one or more DAUG meetings, please take a few minutes to review the DAUG notes. We often cover a lot of material during the DAUG meetings (some of it detailed and specific). Please let us know if you have any questions.

Summer 2019

SIS – SAFM		SIS – Departmental Awarding (FA) Pages			Oracle
Budget/Target Fiscal Year	Academic Term	Financial Aid Aid Year	Summer Award Type	Projected Disburse Date	Charge Appears in Fiscal Year
<u>Tuition Awards</u>					
2018-19	1196	2020	Tuition–Summer 1	May 10, 2019	2018-19
2019-20	1196	2020	Tuition–Summer 2	July 5, 2019	2019-20
<u>Stipend Awards</u>					
2018-19	1196	2020	Stipends - June	May 23, 2019	2018-19
2018-19	1196	2020	Stipends - July	June 18, 2019	2018-19
2019-20	1196	2020	Stipends - August	July 23, 2019	2019-20

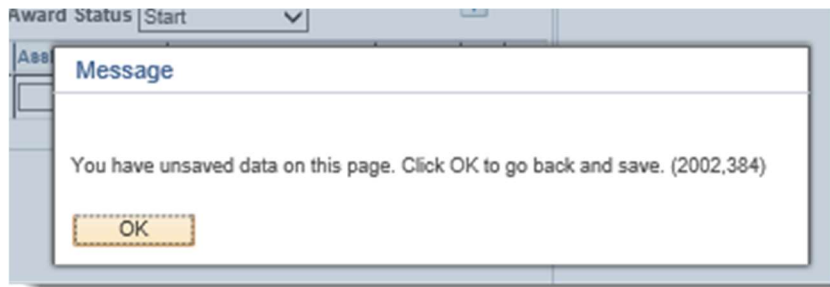
- Awards will credit the student's SIS account on the dates listed above.
- Stipends will process to AP the following day.
- June and July stipends will come from 2018-2019 budgets.
- August stipends will come from 2019-2020 budgets.
- **Regardless of disbursement date, if you enter your award in SAFM after June 20, the funds will come from Fiscal Year 2019-20.**
- Federal aid will disburse depending on what sessions they are taking in the summer and career/program. The students can see the disbursement dates in SIS once the aid has been entered. Contact SFS (Sarah Doran or Debbie Davis) directly regarding questions about Federal Aid.

SAFM Fixes & Enhancements



Prevent “You have unsaved data on this page” Message

- You may have noticed that sometimes you received this message even when there was no data on the page that needs to be saved. This has been corrected.



Default International Checkbox for International Part-time Students

- Part-time international students are charged the international fee.
- Based on the information in SIS, if the student is part-time and international, we have not been defaulting the international checkbox as checked.
- Now, the international student checkbox for part-time students will be defaulted as checked or unchecked based on the information in SIS.
- The part-time package includes wages and tuition fees limited, so the amounts are not calculated for you (you enter the amount manually).
- If the international checkbox is checked, you can decide if you want to include the international fee in the award.

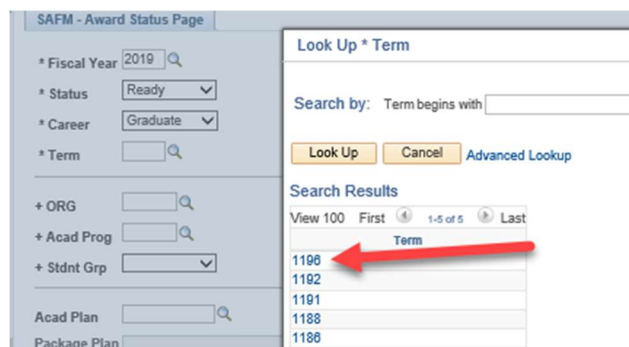
Nursing Academic Category Not Defaulting

- The academic category of “Nursing PhD Levels 1-3” (ASG students) was not defaulting when we first opened SAFM. Now, the default academic category defaults correctly.



Award Status Page Term Lookup

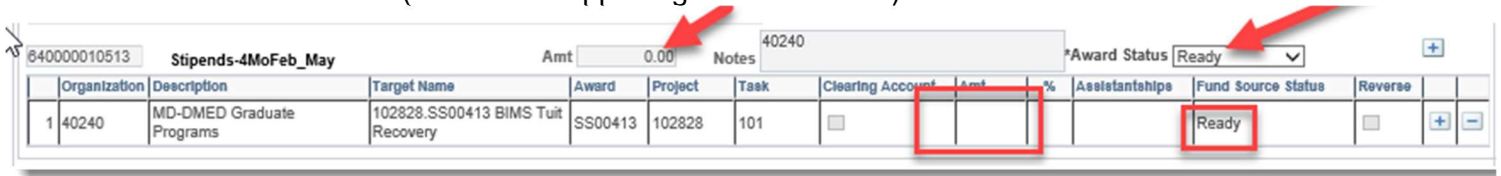
- When SAFM was first opened for 2019-20: In 2019, the 1196 (summer 1) did not appear in the term look-up. School Admins were unable to pull up students in 2019 1196 (summer 1) on the Award Status page.
- The term of 1196 in fiscal year 2019 is now available for you to select.



Prevent Stipend Award = 0 in Ready Status

- If you did this:
 - Packaged student and saved in start.
 - Manually added stipend, entered amount, moved to ready but did not save.
 - Clicked cancel package. Stipend is set to zero, but the award status is in ready.
 - Clicked save.

This happened: The award amount is 0 but the award status is ready. You would be stuck here and unable to re-award this stipend. This was an isolated incident and has been corrected (so it won't happen again in the future).



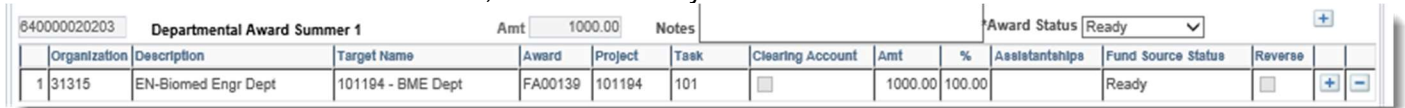
Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1	40240	MD-DMED Graduate Programs	102828.SS00413 BIMS Tuit Recovery	SS00413	102828	101	0.00			Ready	<input type="checkbox"/>

Fixes

In Process

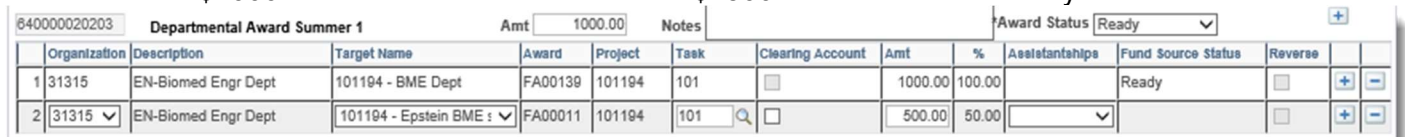
Ensure the Total of Fund Source Amounts = Overall Award Amount

- This recently happened for the first time; we are working to ensure this does not happen in the future. (Note: Disregard the PTAE0/target; I just set this up for test purposes.)
 - User awarded student, moved to ready status.



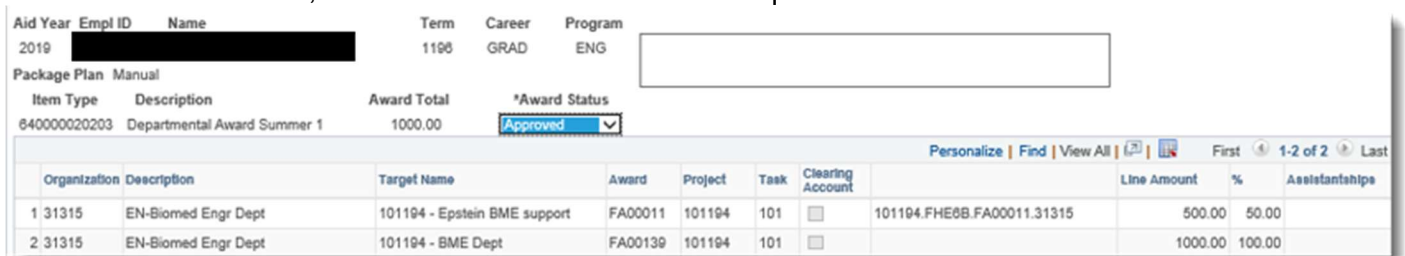
Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1	31315	EN-Biomed Engr Dept	101194 - BME Dept	FA00139	101194	101	1000.00	100.00		Ready	<input type="checkbox"/>

- User then adds a row to increase amount but did not set the award status back to start; they do not increase the overall award amount. Note that the award = \$1000 but the fund source amounts = \$1500 and the status is ready.



Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1	31315	EN-Biomed Engr Dept	101194 - BME Dept	FA00139	101194	101	1000.00	100.00		Ready	<input type="checkbox"/>
2	31315	EN-Biomed Engr Dept	101194 - Epstein BME	FA00011	101194	101	500.00	50.00			<input type="checkbox"/>

- Users are prevented from moving to approved on the awarding page, but the school admin can go to the award from ready to approved via award status page, however, the fund source amounts do not equal the overall amount of the award:



Aid Year	Empl ID	Name	Term	Career	Program
2019			1196	GRAD	ENG

Item Type	Description	Award Total	*Award Status
640000020203	Departmental Award Summer 1	1000.00	Approved

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Line Amount	%	Assistantships
1	31315	EN-Biomed Engr Dept	101194 - Epstein BME support	FA00011	101194	101	500.00	50.00	
2	31315	EN-Biomed Engr Dept	101194 - BME Dept	FA00139	101194	101	1000.00	100.00	

- When the interface runs, the DA/PTAEO page will be incorrect; the overall award amount will be less than the sum of the fund source amounts.

- In the case above, the award should have been set back to start, the award amount increased, the fund source added, and then moved through the workflow. Basically, the user should not have been able to add a fund source row when the award was in ready. We are working on correcting this so it will not happen in the future.

Enhancements

Completed

Cancel Package, Delete GRA/GTA Hours

- Background: For students who have withdrawn, cancelled, or have moved to affiliated status, we have instructed you to cancel their awards in SAFM.
- You run the SAFM discrepancy reports to help you identify these students, and then you must:
 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.
 - a. However, the system enforces this rule: You may not cancel a health insurance award if the student is in a qualified GRA/GTA package. So, if the package was a qualified GRA or GTA package, you had to make sure to zero out the GRA and GTA hours before reversing the health insurance.



- Step #3a has been a source of confusion. Often, you may not realize that the GRA/GTA hours need to be deleted in order to cancel health insurance.
- Now, when you cancel a package, GRA/GTA hours will be deleted for you.
- One less step that you will need to complete in order to cancel health insurance!

Enhancements

In Process


Display Pop-Up Message on SAFM Student Awarding Page when Student's Situation Changes

- Background:
 - This scenario was brought up by a user last fall: User enters awards in SAFM for a student who they assume will be a full-time student in the coming semester. However, at some point between when user entered the funding and when the semester begins, the student's form of study changes from enrolled to affiliated. Department no longer wishes for the student to be fully funded.
 - Typically, we recommend that users run discrepancy reports regularly to find these students and take the necessary actions of cancelling or modifying their awards. (See "Reminder: Enrollment Discrepancy Reports (UBI)" topic of the October DAUG meeting notes on the DAUG website for details/instructions.)
 - However, it was suggested that an informational pop-up message in SAFM would be helpful: When the user comes into the SAFM Awarding Page, display pop-up message on the awarding page if the student goes from a form of study of enrolled to affiliated.

- We asked the users at the DAUG meeting in April 2019 if displaying the pop-up message would be helpful and they said yes; they also had a few additional requests.
- Request from the users:
 - A pop-up message display should display for students who have gone from enrolled to affiliated status, have graduated, or have been deactivated (withdrawn).
- We are currently working on this.
- Important note: This will not obviate the need to run the discrepancy report as usual. This is a just an added pop-up message that will inform the users of a change if they happen to be on the SAFM awarding page. You do not need to go student-by-student to see if a pop-up message appears. The reporting solution is (obviously) much more efficient.


ESHARP Workflow

- As School Admins, you may get questions regarding ESHARP requests; specifically, users may tell you that they submitted the request but want to know where it their request is in the process.
- Users should be able to see where their own requests are in the ESHARP workflow. They can log in to ESHARP and then click on View Current and Historical Requests for Access.



[View Current and Historical Requests for Access](#)
View the work flow process of a submitted responsibility.

- Click on View Requests for Access – Current.



[View Requests for Access - Current](#)
This view displays all your current requested responsibilities.

- Your Workflow Roles = Self, click Submit.

Your Workflow Role: Current Action Items Only Employee (Computing Id or Last Name)

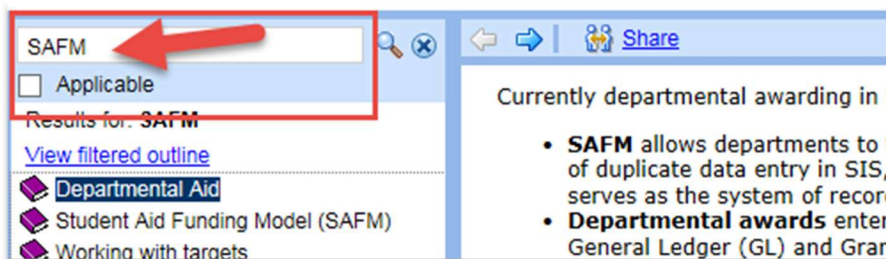
- Select the role; click on the blue Status link at the far right.

Effective Date	Submitted Date	Instance	Module	Responsibility	Action	Status	Employee	Roles	Comment	Status
10/02/2012	10/02/2012	Production	Student Records	...	Add	Submitted	...			View Status

- Look for the row that indicates that the status is current (yellow flag). This is the step that the request is in currently. (Tip: If you click on the blue link in the Workflow Role column for the current step, a window will pop-up that indicates the users in that role.)
- If there are specific questions, we can pull up ESHARP today and look.

Getting Help: Resources and Contacts

Training Materials & Quick Guides



School Admins

When we meet with the users, we instruct them to contact their school admin with questions. However, we are listing the school admins here as you may wish to reach out to your peers with questions or for advice.

School/Unit	School Admin	Phone	Email
Architecture	Carolyn Buchanan	4-6228	ceb4gw
BIMS	Fay Miller	4-2217	jff3f
Curry	Dana Stanley	4-7131	dfb6n
Engineering	Joan Wicks	4-4380	jew9s
GSAS	Lloyd Banks	4-3919	lb3ne
Nursing	Julie Kusnerik	4-1978	kak8bz
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.

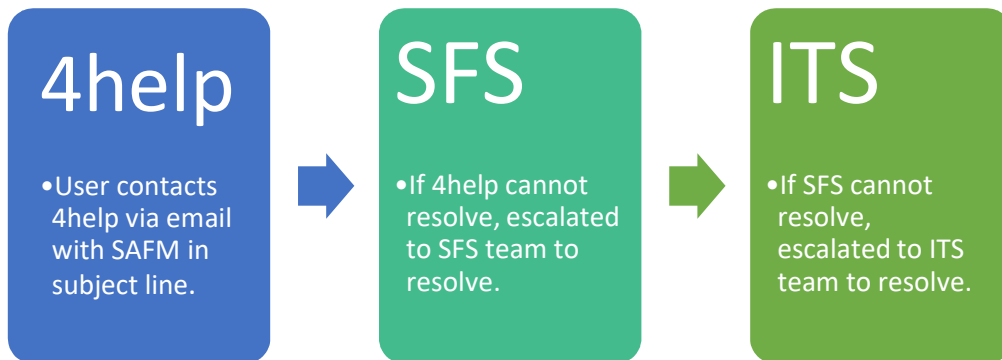
DAUG Meetings

Recurring meetings (typically August – April), second Wednesday of each month @ 3:30pm. The next scheduled meeting is on August 14, 2019 @ 3:30pm. Our meeting location is Ruffner

206 (Thank you, Dana!) If you are unable to attend, please consider sending a representative on your behalf.

Additional Help

Send questions to 4help@virginia.edu; enter “SAFM” in subject line. Sending your questions to 4help@virginia.edu ensures that we can track the issues and analyze the types of questions asked.



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Questions?

