Departmental Aid User Group (DAUG)

October 2026

University of Virginia · Student Financial Services

Key Topics

Key Topics	Item / Objective
Important Dates	• SAFM/DA closed for 2025-26 entry **September 30, 2026** • Health insurance charges posted **September 30, 2026** • Health insurance subsidy fall disbursement **October 1, 2026** • 2027 Spring tuition calculates **November 13, 2026** • All 2027 Spring entries should be approved by **December 4, 2026**
Reminders and Updates	• Foreign National Tax • Graduate Aid Updates & Reminders – part-time direct loan adjustments • SAFM corrections, cancellations & errors • Department Awarding Portal updates (DEMO) • Payments to Students guidance - research and travel grants
Summer Awarding	• New process to be implemented for summer awarding during a term of non-enrollment.

Important Dates including Stipend Disbursement Dates

See https://sfs.virginia.edu/departmental-aid-users

Graduate Aid Updates & Reminders

- **Part-time direct loan adjustments:** required as part of OB3, part-time students changing enrollment levels will likely have financial aid adjustments
- **SAFM Corrections & Cancellations**: Need changes to 2025-26 or prior years? Use the Department Awarding Tool and select "**GRAD Correction/Update**" or "**GRAD Cancellation**" in the drop-down award type option. Remaining questions go to SFS-Internal@virginia.edu with SAFM in the subject line and the relevant EMPL IDs in the body of the email.
- **Resolving SAFM Errors**: please resolve SAFM errors at the end of each term.
  - **SAFM Award Status Report -** You can search for awards in Error status by using the SAFM Award Status report. This can be found in the Student Financial Aid reports and is under SIS FA SAFM. Select the Award Status report and enter the following:
    - Fiscal Year
    - Cost Center

        - Select “Error” in the Award Status column (if “Error” is greyed out, you do not have any awards in error status for the selected cost center)
- **Withdrawn Students**: For students who have withdrawn, cancelled, or have moved to Affiliated Status, please make sure to back out their awards in SAFM.
    - You can run the SAFM Discrepancy Reports to help you identify these students.
    - SAFM Cancel Package Process:
        - Select option to ‘Cancel Package’ which zeroes out all package awards and moves them to Ready.
        - Approve, save and the cancellations will post in SIS overnight.
          Note: If you cancel an entire GRA/GTA package and wish to cancel the health insurance, you will need to zero out the GRA/GTA hours.
    - SAFM Cancelling individual awards:
        - Check reverse for specific award lines and, after validation, select option to ‘Reverse Fund Source’. The system will add the reversal line and move the award to Start.
        - You must zero out the amount and save. You can then move the reversal to Ready.
        - Approve, save and the cancellations will post in SIS overnight.
          Note: If you wish to cancel the health insurance, you will need to zero out the GRA/GTA hours.
- **Unapplied Credits**: please resolve unapplied credits at the end of each term.
    - Unapplied credits are awards associated with specific charges (dining, housing, health insurance, etc.) that cannot be applied because the charges are not posted or are less than the award.
    - UBI Report captures unapplied aid: Unapplied Credits – UBI Report
        - Users will need the **EDW_P_Student_Finance** role if you don’t already have it yet.

Department Awarding Portal Updates

- **Updated look and feel to optimize space:** allowing more data and less whitespace
- **Request creation:** requires that you select both career and aid year when creating a request
    - GRAD and UGRD awards must be in separate requests
    - Minimizes confusion for awarding team, streamlines processing
- **Error Handling:** clear and more organized
    - Prevents duplicate rows
    - Prevents zero dollar rows (except for cancellations)
- **History:** request history feature is more robust
    - Request history for each status change is logged and viewable
    - Changes to award type, timeframe and amounts are logged

Payments to Students

PAYMENT ACTIVITY	DEFINITION	COA INCREASE	PAYMENT PROCESS
Research Grant - During Terms of Enrollment	Given to support student-driven, scholarly projects that are typically conducted under the mentorship or guidance of a faculty member.	Yes - Only for approved, eligible costs (outside of what is included in the COA)	Submit request through SFS Department Awarding Portal or SIS SAFM

For undergraduate students, the COA may be increased to include research-related expenses if all the following conditions are met:

1. The expenses do not cover housing, food, or other living costs.
2. The research must begin and be completed during the term of enrollment.
3. The school or department must have an application process to collect application materials, such as a description of the research project and faculty letters of support, a budget outlining anticipated research costs, and documentation to support anticipated costs, such as price quotes, receipts, or invoices.
4. The school or department must have a review process in place to review applications and budgets and make approval decisions.

For graduate students, the COA may be increased to include research-related expenses if all the following conditions are met:

1. The expenses do not cover housing, food, or other living costs.
2. The school or department must collect a description of the research project, budget outlining anticipated research costs, and documentation to support anticipated costs, such as price quotes, receipts, or invoices.

PAYMENT ACTIVITY	DEFINITION	COA INCREASE	PAYMENT PROCESS
Travel Grant - During Terms of Enrollment	Given to students traveling to participate in academic or professional experiences that enhance their learning, skill development, research activity, and career readiness. *See Payments to Students Guide for eligibility requirements.*	Yes - Only for approved, eligible costs	Submit request through SFS Department Awarding Portal or SIS SAFM

For undergraduate students, the COA may be increased to include travel-related expenses not already included in the budget if all the following conditions are met:

1. The travel must begin and be completed during the term of enrollment.
2. The school or department must have an application process to collect application materials, such as a description of the travel experience, a budget outlining anticipated travel costs, and documentation to support anticipated costs, such as price quotes, receipts, or invoices.
3. The school or department must have a review process in place to review applications and budgets and make approval decisions.

For graduate students, the COA may be increased to include travel-related expenses not already included in the budget if the following condition is met:

1. The school or department must collect a brief description of the travel experience, a budget outlining anticipated travel costs, and documentation to support anticipated costs, such as price quotes, receipts, or invoices.

The school or department must send the approved application and/or budget information to Student Financial Services (SFS) Department Support at sfs-deptsupport@virginia.edu. Upon receipt, SFS will review the submitted budget and determine whether a COA adjustment is allowed.

Departments that do not currently have a process in place for collecting applications and/or budget documentation should request guidance from SFS Department Support by emailing sfs-deptsupport@virginia.edu.

Summer Awarding - non-enrollment

Background/Issue

Providing funds for students that are participating in an educational experience but are not enrolled in summer coursework creates compliance and operational issues. If a recipient is receiving financial aid, federal regulations require the University to take into account any student payments awarded over the summer in the subsequent term, potentially reducing financial aid availability for students in the fall.

Summer 2027 - Process Changes

Students receiving funding for eligible educational experiences during the summer with no course enrollment and no summer budget will be enrolled in a **0-credit, no fee course**. This enrollment will allow Student Financial Services to build a summer budget for these students and process awards through SIS.

Departments and Schools will need to work with Student Financial Services to provide information and documentation around the summer programs/experiences in order for SFS to assess eligibility. We have not finalized the operational plan, but the thought is that SFS will work with Summer Session to enroll eligible students and then SFS will process awards accordingly.

In order for students to be eligible for payments during a summer term with no enrollment, the program or educational experience must be documented in such a way and with enough detail to reference for audit purposes. This can be a website, a published program description, an application process, etc.

Getting Help: Resources and Contacts

Payment to Students website: https://sfs.virginia.edu/payments-students

Department Aid Website: http://sfs.virginia.edu/internal/deptaid

Department Aid Awarding Portal: https://sfs.virginia.edu/department-awarding-portal

For **undergraduate awarding and department awarding portal questions**, contact sfs-deptsupport@virginia.edu.

For **SAFM support**, check with your School Admin first (listed below). If you still have outstanding questions, send them to sfs-deptsupport@virginia.edu.

SAFM School Admins

School/Unit	School Admin	Phone	Email/Teams
Architecture	Carolyn Buchanan	4-6228	ceb4gw
Batten	Cindy Moore	2-2033	chm3b
BIMS	Kim Fitzhugh		kaf5r
Ed. & HD	Dana Stanley	4-7161	dfb6n
Data Science	Diane Wendelken	3-5132	dw4va
Engineering	Amanda Gregg		acg8z
GSAS	Evan Barrow		egb5z
Nursing	TBD		