

Copying an Award Entry Batch

PATH: Main Menu > CAL Components > Financial Aid > Award Entry > Administer Batch Ext Awards

This job aid will cover how to copy an award entry batch.

Examples of when to make a copy of an Award Entry Batch:

- If you need to edit a submitted batch after it has been Approved and Posted. You will do this by copying an existing Award Entry Batch to the *current* aid year. See the job aid on Revising a Posted Award Entry.
- If you wish to copy a batch from this Aid Year into the next Aid Year. This will help save time when you have recurring awards across aid years.

In this example, we are copying a current Award Entry Batch to the next aid year and making minor changes to the awards. Because we are copying into a new aid year, we do not have to worry about impacting any existing awards.

1. Search for the original Batch

If you know the exact Batch Number, you can enter that in the **Batch Number** field. If you do not know the batch number, but know the name of a student on that batch, the easiest way to find it is to search by student to find which of their batches you wish to edit. Refer to the [Search Student's Awards](#) job aid for instructions on how to search.

Alternatively, you can do a broad search on the Administer Batch Ext. Awards page. Make sure that the **Institution, Aid Year, Career, and Org Level 4** (aka department) are filled out. Entering the **Org Level 4** is encouraged, but not required if you have the batch number.

Check the defaulted fields. **Fin Aid Type** defaults to **Department Awards** (depending on your access). Make sure it reflects the appropriate choice of **Department Awards** or **Graduate Division Awards**.

Make sure that the **Status** is **Posted**, not **Pending**.

Click **Search** to see the results.

The screenshot shows a search form with the following fields and values:

- Batch Number: 3214
- Institution: UCB01
- Aid Year: 2017
- Career: Graduate
- Fin Aid Type: Department Awards
- Org Level 4: EUNEU
- Status: Posted
- Award Batch: (empty)

 A red box highlights the Search button.

If the batch number is entered, we will only see one result.

If we did a broader search, we might see several batches and would need to determine which was the correct one.

The screenshot shows the search results page. At the top, the search criteria are repeated. Below the criteria, there are fields for 'Copy To Aid Year' and 'Copy to New Award Batch'. A table displays the search results:

	Batch Number	Institution	Aid Year	Career	Fin Aid Type	Org Level 4	Award Batch	Status	
<input type="checkbox"/>	1	3214	UCB01	2017	Graduate	Department Awards	EUNEU	EL EUNEU	Posted


At the bottom left, there is a Save button.

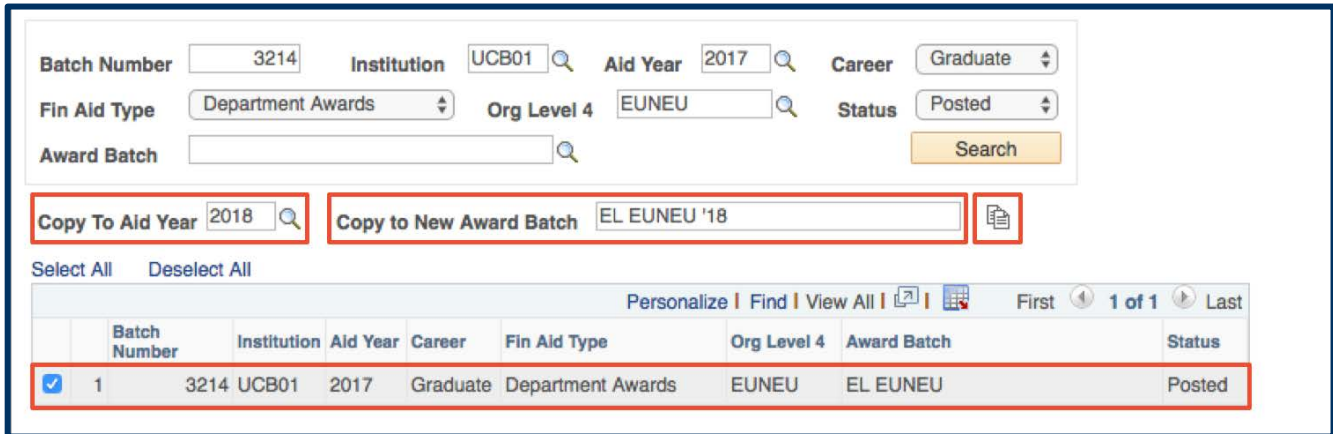
2. Copy the Award

The award entries matching your criteria will display.


Click the **checkbox** to the left of the **Batch Number** of the Award Entry Batch you wish to copy. Enter the **Aid Year** into the **Copy to Aid Year** field. In this example, we are copying to a new Aid Year.

Next, enter a *new name* in the **Copy to New Award Batch** field.

Click the **Copy** icon  next to the **Copy to New Award Batch** field.



Batch Number: 3214 Institution: UCB01 Aid Year: 2017 Career: Graduate
 Fin Aid Type: Department Awards Org Level 4: EUNEU Status: Posted
 Award Batch: [Search]

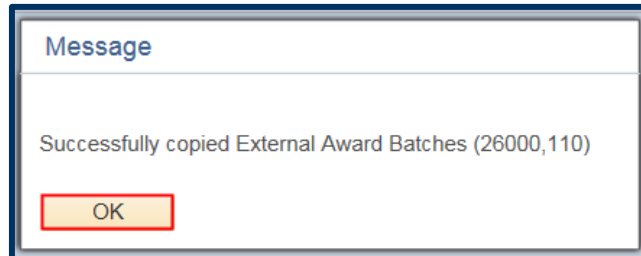
Copy To Aid Year: 2018 Copy to New Award Batch: EL EUNEU '18 

Select All Deselect All

	Batch Number	Institution	Aid Year	Career	Fin Aid Type	Org Level 4	Award Batch	Status
<input checked="" type="checkbox"/>	1	3214 UCB01	2017	Graduate	Department Awards	EUNEU	EL EUNEU	Posted

A message will pop up, saying the copy has been successful.

Click **OK** to acknowledge this message.



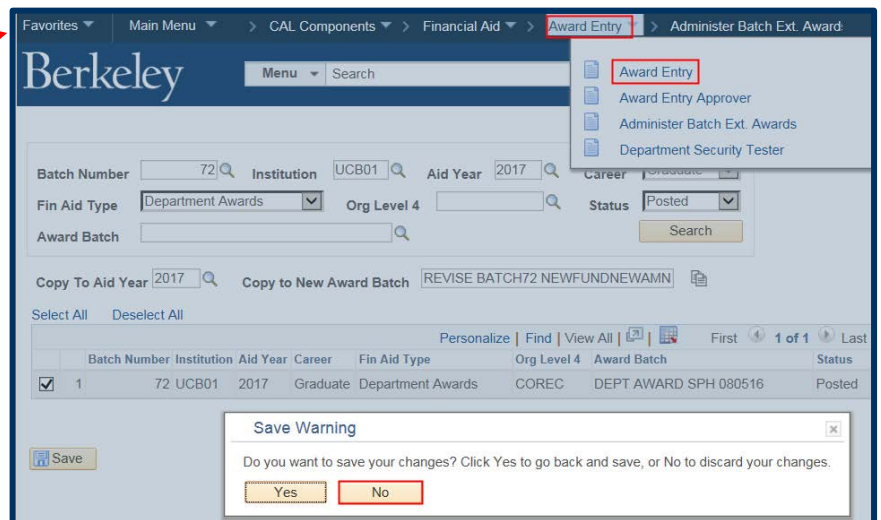
3. View/Update the Copied Award

Next, we will navigate to the **Award Entry** page via the menu links at the top of the page (click **Award Entry > Award Entry**).

A **Save Warning** box will pop up, asking if we want to save the **Search Criteria** (not the copy).

You do not have to **Save**, despite what the message implies.


Click **No** to dismiss the message.



Favorites Main Menu > CAL Components > Financial Aid > Award Entry > Administer Batch Ext. Award

Berkeley Menu Search

Batch Number: 72 Institution: UCB01 Aid Year: 2017 Career: Graduate
 Fin Aid Type: Department Awards Org Level 4: [Search] Status: Posted
 Award Batch: [Search]

Copy To Aid Year: 2017 Copy to New Award Batch: REVISE BATCH72 NEWFUNDNEWAMN 

Select All Deselect All

	Batch Number	Institution	Aid Year	Career	Fin Aid Type	Org Level 4	Award Batch	Status
<input checked="" type="checkbox"/>	1	72 UCB01	2017	Graduate	Department Awards	COREC	DEPT AWARD SPH 080516	Posted

Save Warning
 Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.
 Yes No

On the Award Entry page, it should default to the **Find an Existing Value** tab. We can now search for the copy we made.

If you have set up the **Aid Year** to default, it will show the current year. Be sure to search for the aid year to which we copied the Award Entry Batch. In some cases you will be copying into the same year to make a revision, but in this case we are setting this up for the next year.

Enter the **Academic Career**, **Financial Aid Type** and **Organizational Level 4** (Department code).

Optional: You can include the “name” in the **Award Batch Package** field.

Click **Search**.

The results display below.

In this example, we have a new Batch Number 8111.

Click anywhere in the line to make the appropriate edits.

We are now in the new Award Entry batch.

Notice that it references the original batch number in the upper right corner (“Revised From Batch Nbr 3214”).

This is one benefit of copying the original batch, rather than creating a new entry. Especially when you are doing a revision, it is helpful to be able to reference the original batch.

Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
<input type="checkbox"/>	1 945100055580	Departmental Award		Active	3708.00	Refunds/Stipends Only	Fall and Spring	Fall Spring

Item Type	Student Award Description	Student ID	Name	Disburse Plan	Split Code	Award Amount
<input type="checkbox"/>	1 945100055580 Departmental Award	24090816	Gina Grad	MB	MB	3708.00

4. Update the Awards Section

Because this is a copy to a new aid year, we can now make whatever changes are needed. Adding/deleting Item Types, adding or deleting a student, changing the Disbursement and Split codes, etc.

However, if you have copied this award batch in order to do a revision for the same aid year, please see the [Revising a Posted Award Batch](#) job aid for assistance. Revisions within the same aid year can cause issues if the same Item Type is used, and if one is not careful with the Disbursement plans and Split codes.

Support

For questions or assistance, please contact SIS Support.:

Call **510-664-9000** (press **option 6** to reach SIS support)

Email: sishelp@berkeley.edu