

Department Award Entry

Path: Cal Components > Financial Aid > Award Entry

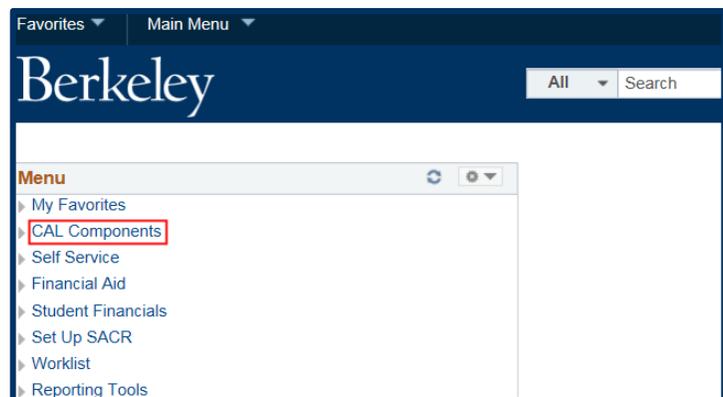
Department Awards allow departments to add a variety of awards to a student's financial aid package. This was previously done in *DSAS*, but will now be done in *Campus Solutions*.

Before beginning an award entry, make sure that you have set your system defaults. This is a once a year set up that is needed to make certain values fill in. For more information refer to the [SetUp SACR Defaults for Financial Aid](#).

This job aid will cover how a department can enter departmental award(s) to one or more students at a time (in batches). In this example, we will enter 2 Department awards to two of our department's students.

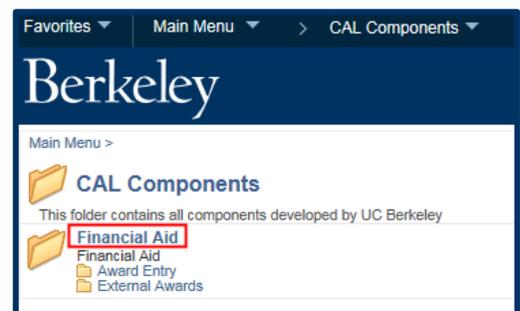
After logging into Campus Solutions, use either the top menu or the left hand menu.

Click the [Cal Components](#) link.



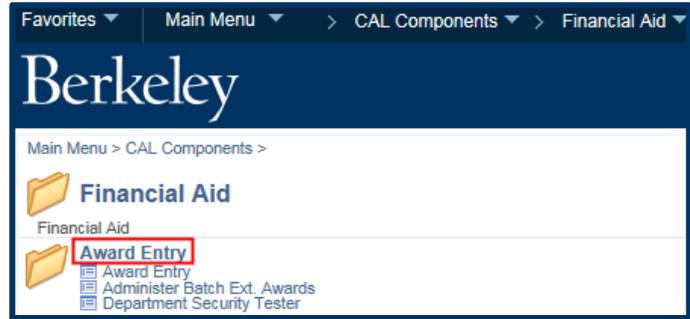
Click the [Financial Aid](#) link in the Cal Components folder.

NOTE: You can also click directly on the Award Entry folder from this view

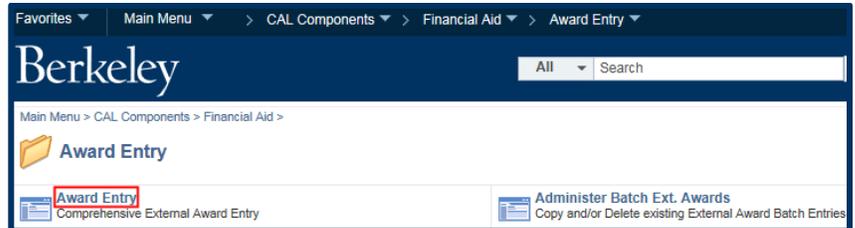


Click the Award Entry folder.

NOTE: From this view, you could also click directly on the Award Entry link.



In the **Award Entry** folder, click the Award Entry link.

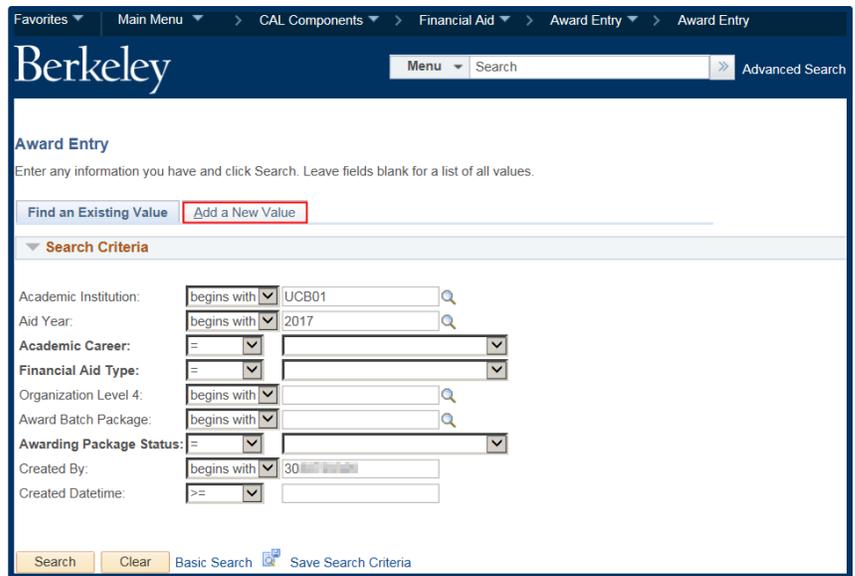


The **Award Entry** page displays.

Note: If you will enter awards regularly, consider clicking the **Favorites** link and add this page.

The first page defaults to **Find an Existing Value**, where we could look up existing awards.

In this example, we want to add a new award, so we will click the **Add New Value** tab.



The **Add New Value** page displays. Because the system defaults have already been setup, the Aid Year has filled in for us, otherwise we would need to add that.

Now we will need to specify some information about the award(s) we are about to enter.

Select the **Academic Career** (*Graduate, Undergraduate, or Law*) of the student(s) who you will be making awards to.

NOTE: You can not combine students in different Careers (e.g. Ugrad & Grad) in the same entry (batch).

In this case we will select *Graduate* from the drop-down list.

We have to specify if this is a **Graduate Division Award** (e.g Block Grant or Departmentally Restricted, formerly done through GLOW) or **Department Award** (formerly done through DSAS).

Note: Depending on your access you may only have one of the choices in your menu.

In this example, we will select **Department Awards**.

The screenshot shows the Berkeley Award Entry form. The breadcrumb trail is: Favorites > Main Menu > CAL Components > Financial Aid > Award Entry > Award Entry. The form has a search bar and an 'Advanced Search' link. Below the search bar are two buttons: 'Find an Existing Value' and 'Add a New Value'. The form fields are: Academic Institution: UCB01; Aid Year: 2017; Academic Career: (empty dropdown); Financial Aid Type: (empty dropdown); Organization Level 4: (empty search field); Award Batch Package: (empty search field). An 'Add' button is at the bottom left.

This screenshot is similar to the previous one, but the 'Academic Career' dropdown menu is now open and 'Graduate' is selected. The 'Add' button is highlighted with a red box.

This screenshot shows the 'Financial Aid Type' dropdown menu open with 'Department Awards' selected. The 'Add' button is highlighted with a red box.

Next, we'll need to select which department we are doing awards for.

Click the **Lookup Icon** to the right of the **Organization Level 4** field. The choices in the lookup will depend on your security. Some people will have access to only one department, some may have a couple of options.

In this example, we will click on the department (**COREC**) we wish to award for.

Now we will name this "batch" something that makes sense to anyone in our department searching for or viewing this information.

For example, if we were preparing some stipends for a professor's students, we could name the batch "Prof Lee stipends".

If multiple people in the department prepare awards, you may want to discuss a naming convention (for example, always adding initials to the end of a batch name to clarify who entered it).

In this example, we will enter the title of "SPH deptaward july16 XX" into the **Award Batch Package** field.

The screenshot shows the 'Award Entry' form on the left and a 'Look Up Organization Level 4' popup window on the right. The form fields include: Academic Institution (UCB01), Aid Year (2017), Academic Career (Graduate), Financial Aid Type (Department Awards), Organization Level 4 (with a red box around the lookup icon), and Award Batch Package. The popup window shows search results for departments, with 'COREC' highlighted in red. The search results table is as follows:

Department	Description
COREC	SPH Divisional Rsrch and Cntrs
CPACA	SPH Academic Dept
CQADM	SPH Administration

The screenshot shows the 'Award Entry' form with the following values: Academic Institution: UCB01, Aid Year: 2017, Academic Career: Graduate, Financial Aid Type: Department Awards, Organization Level 4: COREC, and Award Batch Package: SPH deptaward july16 XX. The 'Award Batch Package' field is highlighted with a red box.

When all the required fields are filled in, click the **Add** button.

Award Entry

Find an Existing Value Add a New Value

Academic Institution:

Aid Year:

Academic Career:

Financial Aid Type:

Organization Level 4:

Award Batch Package:

Add

The **Award Entry** page displays. The top of the page shows summary information of the criteria entered earlier (Departmental Award, Aid Year, Career, etc.) The **Status** will always start as *Pending*.

Batch Number Department Awards

Institution UC Berkeley Aid Year Federal Aid Year 2016-2017 Career Graduate

Org Level 4 SPH Divisional Rsrch and Cntrs Award Batch SPH DEPTAWARD JULY16 XX

Status Pending Comments Created By

Approver

Select All Deselect All Delete Add

Awards Personalize | Find | View All | | First 1 of 1 Last

Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
<input type="checkbox"/> 1	<input type="text"/> <input type="button" value="Q"/>	<input type="text" value="Description"/> <input type="button" value="Q"/>		Active				

Select All Deselect All Delete Add Student Search

Students Personalize | Find | View All | | First 1 of 1 Last

Student ID	Name	Award Summary
<input type="checkbox"/> 1	<input type="text" value="Name"/> <input type="button" value="Q"/>	<input type="button" value="v"/>

Apply Disbursements Delete All Replace Disbursements using first row values

Disbursements Personalize | Find | View All | | First 1 of 1 Last

Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>

ID	Date	Amount
1		<input type="text" value="0.00"/>

Use the link to add **Comments** if you need to add a message to the approver.

The **Batch Number** and **Created By** fields will fill in once we click **Save**.

We'll come back and select the **Approver** after we fill out the rest of the page.

Adding the Awards

The **Awards** section is where we'll enter the source of the funding and payment options (represented by the **Item Type**) and the total **Amount** to be given to each student.

Awards Personalize Find View All <input type="button" value="v"/> <input type="button" value="v"/> First 1 of 1 Last									
	Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
<input type="checkbox"/> 1	<input type="text"/> <input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="text" value="Description"/> <input type="button" value="Q"/>		Active	<input type="text" value="0.00"/>			

If you know which Item Type(s) you will be using, you can enter that directly in the Item Type field.

An Item Type is a 12 digit number that combines the funding source (chartstring) with a charge priority (what can be paid). **Note:** All Departmental award Item Types begin with "945"

The easiest way to find the relevant Item Type is to click the **Lookup Icon** under **Advance Search**.

The **Item Type Search** page will display.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
1	<input type="text" value="Q"/>	Description		Active					

Item Type Search

ItemType Status:

Item Type:

Item From:

Item To:

Description:

Short Desc:

Key Word 1:

Key Word 2:

Key Word 3:

Charge Priority:

Refundable Indicator:

Enrollment Required?
 Summer Award?

Account:

Fund Code:

Department:

Chartfield 1:

Chartfield 2:

Select an Item Type and then choose Return

Item Type	Description	Additional Info	Charge Priority	Chartfield 1	Chartfield 2
1	Item Type				

It is recommended to search by **Charge Priority** to narrow your search. A Charge Priority indicates what will be paid for.

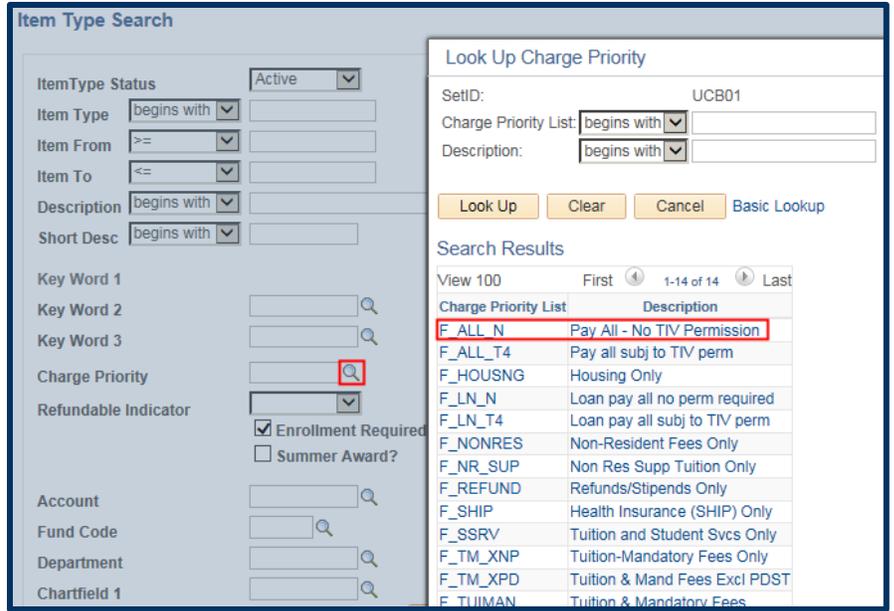
We've clicked the Charge Priority Lookup icon  to see our options.

Please refer to the [Charge Priority reference guide](#) for a list of the Charge Priorities and definitions of what they will pay. It is recommended to use a broader Charge Priority (F_TUIMAN) than a restricted Charge Priority (F_NR_SUP) that will only pay 1 fee.

In this example we want this money to pay all fees, including any outstanding balances, so we'll click on **F_ALL_N**.

The most common search will be by chartstring values (e.g. Fund, Dept, Chartfield or some combination of these).

In this example we will enter a **Fund** and a **DeptID**.



Item Type Search

Item Type Status: Active

Item Type: begins with

Item From: >=

Item To: <=

Description: begins with

Short Desc: begins with

Key Word 1:

Key Word 2:

Key Word 3:

Charge Priority: 

Refundable Indicator: Enrollment Required? Summer Award?

Account:

Fund Code:

Department:

Chartfield 1:

Look Up Charge Priority

SetID: UCB01

Charge Priority List: begins with

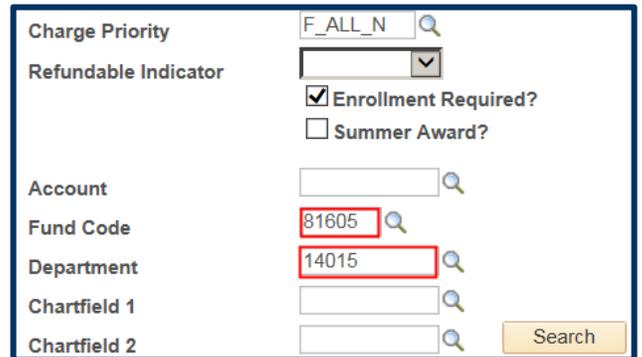
Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-14 of 14 Last

Charge Priority List	Description
F_ALL_N	Pay All - No TIV Permission
F_ALL_T4	Pay all subj to TIV perm
F_HOUSNG	Housing Only
F_LN_N	Loan pay all no perm required
F_LN_T4	Loan pay all subj to TIV perm
F_NONRES	Non-Resident Fees Only
F_NR_SUP	Non Res Supp Tuition Only
F_REFUND	Refunds/Stipends Only
F_SHIP	Health Insurance (SHIP) Only
F_SSRV	Tuition and Student Svcs Only
F_TM_XNP	Tuition-Mandatory Fees Only
F_TM_XPD	Tuition & Mand Fees Excl PDST
F_TUIMAN	Tuition & Mandatory Fees



Charge Priority: F_ALL_N 

Refundable Indicator: Enrollment Required? Summer Award?

Account:

Fund Code: 81605 

Department: 14015 

Chartfield 1:

Chartfield 2:

Search

Now that we've entered our search criteria (chartstring information, Charge Priority), we will click the **Search** button to see if any Item Types match.

Item Type Search

Item Type Status	Active	▼
Item Type	begins with	▼
Item From	>=	▼
Item To	<=	▼
Description	begins with	▼
Short Desc	begins with	▼
Key Word 1		
Key Word 2		🔍
Key Word 3		🔍
Charge Priority	F_ALL_N	🔍
Refundable Indicator		▼
	<input checked="" type="checkbox"/>	Enrollment Required?
	<input type="checkbox"/>	Summer Award?
Account		🔍
Fund Code	81605	🔍
Department	14015	🔍
Chartfield 1		🔍
Chartfield 2		🔍

Search

Depending on how broad or narrow the search criteria, we may see several results or even none at all.

In this example we have 5 results that match our search.

To narrow the results, we could return to the search fields and add more information (Fund, Dept and/or Chartfield1) and click Search again.

We could also click on the Item Type number to review the details (but this is not recommended unless you are familiar with Item Types).

If we had no results we might have needed to create a New Item Type by clicking the [Create New Item](#) button. For more information, please see the job aid *Create a Financial Aid Item Type*. Note that the creation of a new Item Type requires a separate approval step, so try to use an existing Item Type if possible.

Charge Priority: F_ALL_N
 Refundable Indicator: [dropdown]
 Enrollment Required?
 Summer Award?
 Account: [input]
 Fund Code: 81605
 Department: 14015
 Chartfield 1: [input]
 Chartfield 2: [input]
 Buttons: Create New Item, Search, Return

Select an Item Type and then choose Return

Item Type	Description	Additional Info	Charge Priority	Chartfield 1	Chartfield 2
1	945100020520 Department Award	School of Public Health	F_ALL_N	CPADTR	CPB77
2	945100027990 Department Award	School of Public Health	F_ALL_N	CPERGO	CPB77
3	945100028190 Department Award	School of Public Health	F_ALL_N	CPOEPI	CPB77
4	945100028210 Department Award	School of Public Health	F_ALL_N	CPOEPI	CPB77
5	945100032470 Department Award	School of Public Health	F_ALL_N	CPIHST	CPB77

Account: [input]
 Fund Code: [input]
 Department: [input]
 Chartfield 1: [input]
 Chartfield 2: CPB77
 Buttons: Create New Item, Search, Return

Select an Item Type and then choose Return

Item Type	Description	Additional Info	Charge Priority
1	Item Type		

In this example, we have determined (by looking at the Chartfield 1 and 2 information) that Result#5 is the one we want.

We will click the radio button to select that **Item Type** and then click the **Return** button to go back to the Award Entry page and continue adding the Award.

Note: If you click the **Item Number** you'll be in the Item Type details page and you'll need to click **Cancel**, then come back to this page.

Back on the **Award Entry** page, the **Item Type** number will display, along with the award name a student will see in CalCentral and the department. (e.g. *Department Award-School of Public Health*) and it will confirm the **Charge Priority** (what will pay) for the **Amount** awarded.

The default **Disbursement Plan** and **Split Code** will also display. (We'll see more about those below when we're applying these awards to students.)

Now we enter the total amount each student should get.

In this example, we'd like both of our students to each get \$10,000 (\$5,000 per semester).

The screenshot shows a form with search filters on the left and a table of results below. The filters include Charge Priority (F_ALL_N), Refundable Indicator, Enrollment Required (checked), Summer Award?, Account, Fund Code (81605), Department (14015), Chartfield 1, and Chartfield 2. A 'Return' button is highlighted in red. The table below has columns for Item Type, Description, Additional Info, Charge Priority, Chartfield 1, and Chartfield 2. Item 5 is selected with a radio button.

Item Type	Description	Additional Info	Charge Priority	Chartfield 1	Chartfield 2
1 945100020520	Department Award	School of Public Health	F_ALL_N	CPADTR	CPB77
2 945100027990	Department Award	School of Public Health	F_ALL_N	CPERGO	CPB77
3 945100028190	Department Award	School of Public Health	F_ALL_N	CPOEPI	CPB77
4 945100028210	Department Award	School of Public Health	F_ALL_N	CPOEPI	CPB77
<input checked="" type="radio"/> 5 945100032470	Department Award	School of Public Health	F_ALL_N	CPIHST	CPB77

The screenshot shows a table with columns for Item Type, Description, Additional Info, Status, Amount, Charge Priority, Disburse Plan, and Split Code. The amount field for item 1 is highlighted with a red box and contains the value 10000.00.

Item Type	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
1 945100032470	Department Award	School of Public Health	Active	10000.00	Pay All - No TV Permission	Fall and Spring	Fall Spring

To add another award click the **Add** link.

A new line appears. We can keep adding more awards as long as they are also Departmental Awards and will apply to all the students we will add below.

Note: the order we add awards does not matter, the system will determine what funds are applied to the student's account by looking at the Charge Priority.

In this example, we would like to pay just the NRST payment from a different funding source. We have used the Lookup icon under **Advance Search** to find a 2nd **Item Type** that has the desired chartstring and NRST charge priority combination. We have also entered in the **Amount** we would like paid per student.

We could continue to add more Awards by clicking the **Add** link.

It is recommended to add all the awards to be processed in this batch before proceeding to add the students.

The screenshot shows a table with columns: Item Type, Advance Search, Description, Additional Info, Status, Amount, Charge Priority, Disburse Plan, and Split Code. The first row has Item Type '1 945100032470', Description 'Department Award', Additional Info 'School of Public Health', Status 'Active', Amount '10000.00', Charge Priority 'Pay All - No TV Permission', Disburse Plan 'Fall and Spring', and Split Code 'Fall Spring'. A second row is being added with Item Type '2', Description 'Department Award', Status 'Active', and Amount '7551.00'. The 'Add' link in the top right is highlighted in red.

Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
1 945100032470	Q	Department Award	School of Public Health	Active	10000.00	Pay All - No TV Permission	Fall and Spring	Fall Spring
2	Q	Department Award	School of Public Health	Active	7551.00	Non-Resident Fees Only	Fall and Spring	Fall Spring

The screenshot shows the same table as above, but with two rows highlighted in red. The first row is the same as in the previous screenshot. The second row has Item Type '2', Description 'Department Award', Status 'Active', Amount '7551.00', and Charge Priority 'Non-Resident Fees Only'. The 'Add' link in the top right is also highlighted in red.

Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
1 945100032470	Q	Department Award	School of Public Health	Active	10000.00	Pay All - No TV Permission	Fall and Spring	Fall Spring
2 945100039290	Q	Department Award	School of Public Health	Active	7551.00	Non-Resident Fees Only	Fall and Spring	Fall Spring

Adding Students

We will add the student IDs in the **Students** section below. If we did not have the SIDs, click the **Lookup** icon  to search for students by First and Last Names.

Remember to be careful to select the correct student, as there can be multiple people with the same name.

NOTE: Continuing students will still have the same 8 digit student ids, however new students in Fall 2016 will have a 10 digit student id#s starting with "30".

We have added the first student.

You can click on a student's name to see their billing summary (aka **Customer Accounts**) or click on the **Award Summary** grid to see their Financial Aid Award Summary.

Note: You can also see this information if you have the ability to "View As" a student in *CalCentral*.

Select All		Deselect All		Delete		Add		Student Search	
▼ Students		Personalize		Find		View All		First 1 of 1 Last	
<input type="checkbox"/>	1	<input type="text" value=""/>		Name		Award Summary			

Select All		Deselect All		Delete		Add		Student Search	
▼ Students		Personalize		Find		View All		First 1 of 1 Last	
<input type="checkbox"/>	1	<input type="text" value=""/>		Gary GradStudent		Award Summary			

Customer Accounts:

The **Customer Accounts** page opens up in another browser window. Click the **Account Details** link to see the detail of the student's charged. You may need to click the **View All** link on the Details page to see all the information.

Close the browser window when you are finished reviewing this information.

Financial Aid Award Summary detail page:

The Award Summary page opens up (not as a separate window).

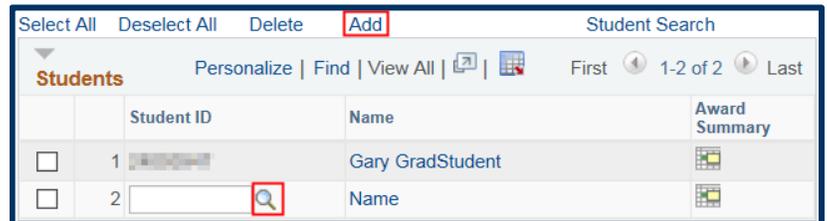
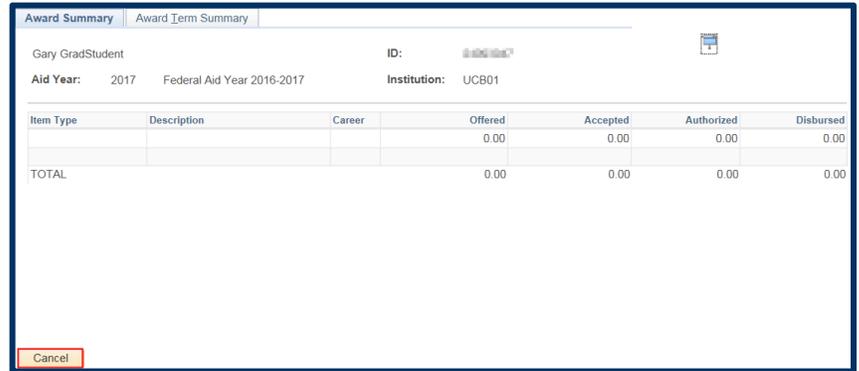
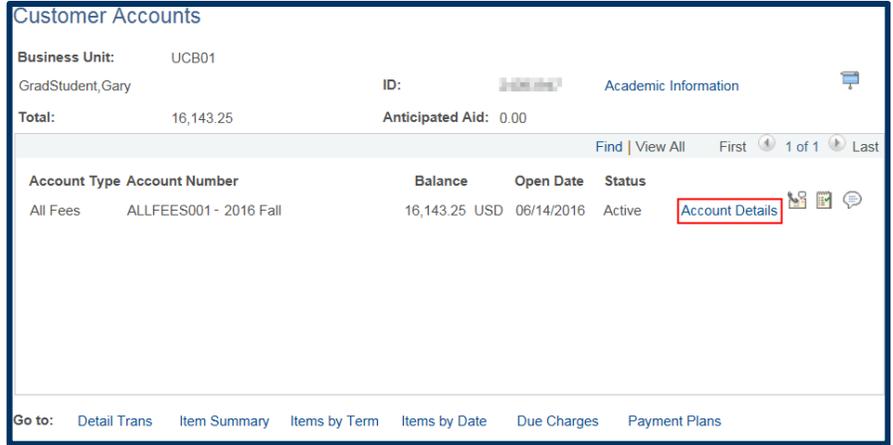
This will display all planned aid for the year. Click on the **Award Term Summary** tab to see a breakdown by semester.

To return to the **Award Entry** page, make sure to click the **Cancel** button at the bottom of the page.

Warning: If you use the browser back button or the menus, you may lose all the work you have done so far.

Back on the **Award Entry** page we can add other students to whom these awards apply.

Click the **Add** link to add another student. When the new line appears, either type in the Student ID# or click the Lookup button find the student.



Our second student has been added. We can add as many students (in the same Career) that these awards apply to.

Note: to delete a student, click the checkbox next to their name and click the [Delete](#) link.

NOTE: At any point in this process if you need to save your work and exit this page, you could do so by clicking the [Save](#) button at the bottom of the page. Then when you return to the Award Entry page you'd use the [Find Existing Value](#) tab to find the pending award entry.

		Student Search	
Students		Personalize	Find View All [Print] [Refresh]
	Student ID	Name	Award Summary
<input type="checkbox"/>	1 [REDACTED]	Gary GradStudent	[Award Summary Icon]
<input type="checkbox"/>	2 [REDACTED]	Gabriella GradStudent	[Award Summary Icon]

Apply and Edit Awards to Students

In the **Disbursements** section below, click the **Apply Disbursements** link.

This will apply the amounts entered from the funding sources chosen to pay the charges listed to each of the students.

Warning: Wait to do this step after ALL the awards and ALL the students have been added, otherwise you may reset any edits made in this section.

Once you have clicked the **Apply Disbursements** link each award will display for each student.

The default **Disbursement Plan** that was setup for this Item Type is **AY = Academic Year** which will pay a standard fall/spring disbursement (e.g. one stipend per semester)

The default **Split Code** is **FS** meaning the payments are split between Fall and Spring.

Usually you may leave those defaults as they are, however they can be changed if needed.

If you need to change the Disbursement Plan, either type in the new value or click the **Lookup icon** to select a different disbursement plan.

Disbursement Plan	Description
AE	Early Fall and Spring
AY	Fall and Spring
MB	Monthly(10) - BEG-AcadYr
ME	Monthly(10) - END-AcadYr
MF	Monthly(2) - BEG-Summer
MH	Monthly(2) - END-Summer
MO	Monthly(9) - BEG-AcadYr
MP	Monthly(3) - BEG-Summer
MR	Monthly(10) - MID-AcadYr
MS	Monthly(2) - MID-Summer
S1	Summer Fiscal 1
S2	Summer Fiscal 2
SE	Early Summer

The most common **Disbursement Plans** are:

- **AE:** Early payment for tuition/fee awards
- **AY:** Standard Fall/Spring disbursement (e.g. 1 stipend per term)
- **MB:** 10 monthly payments, beginning of month
- **MR:** 10 monthly payments, middle of month
- **ME:** 10 monthly payments, end of month (on the 25th)

In this example, we will change the \$10,000 payment to both Gary and Gabriella to monthly payments that pay at the beginning of each month.

Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1	945100032470 Department Award	Gary GradStudent	MB		10000.00
2	945100039290 Department Award	Gary GradStudent	AY	FS	7551.00
3	945100032470 Department Award	Gabriella GradStudent	MB		10000.00
4	945100039290 Department Award	Gabriella GradStudent	AY	FS	7551.00

Once we enter a different disbursement plan the appropriate **Split Code** will also need to be entered. Split codes are conditional, meaning different ones may be used depending on which **Disbursement Plan** you have chosen.

Apply Disbursements		Delete All		Replace Disbursements using first row values	
Disbursements		Personalize Find View All [Print] [Refresh]		First 1-4 of 4 Last	
Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1	945100032470 Department Award	[Redacted]	Gary GradStudent MB	MB	10000.00
2	945100039290 Department Award	[Redacted]	Gary GradStudent AY	FS	7551.00
3	945100032470 Department Award	[Redacted]	Gabriella GradStudent MB	MB	10000.00
4	945100039290 Department Award	[Redacted]	Gabriella GradStudent AY	FS	7551.00

If you know the **Split Code**, enter it, otherwise click the **Lookup icon** to see the relevant Split Codes.

The most common **Split Codes** are:

- **FS:** Fall & Spring
- **FL:** Fall only
- **SP:** Spring only
- **MB, MR or ME:** Monthly, Fall & Spring (depending on the time of the month selected previously)
- **MF:** Monthly, Fall only
- **MS:** Monthly, Spring only

In this case we will choose **MB** so that our monthly payment pays for Fall and Spring.

Note: You can change the **Award Amount** in this Disbursements if they will differ for an individual student (e.g. change Gary's first line to \$8,000) from what was entered above.

To review the payment dates (they are not editable) or edit the specific amounts for each payment, click the red pencil icon  next to each student's award.

In this example, we'll review Gary's monthly payment first.

Apply Disbursements							Delete All		Replace Disbursements using first row values			Department Award	
Disbursements							Personalize		Find View All  			Gary GradStudent	
Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount		ID	Date	Amount				
1	945100032470 Department Award	Gary GradStudent	MB	MB	10000.00		1 01	08/01/2016	1000.00				
2	945100039290 Department Award	Gary GradStudent	AY	FS	7551.00		2 02	09/01/2016	1000.00				
3	945100032470 Department Award	Gabriella GradStudent	MB	MB	10000.00		3 03	10/01/2016	1000.00				
4	945100039290 Department Award	Gabriella GradStudent	AY	FS	7551.00		4 04	11/01/2016	1000.00				
							5 05	12/01/2016	1000.00				
							6 06	01/01/2017	1000.00				
							7 07	02/01/2017	1000.00				
							8 08	03/01/2017	1000.00				
							9 09	04/01/2017	1000.00				
							10 10	05/01/2017	1000.00				

The **Date** of scheduled disbursements will show.

If an award is entered after the first payment date, retroactive payments will pay as soon as they can.

The payment dates are not editable. The only way to change a payment date would be to pick a different disbursement plan (e.g. a monthly plan that paid at the end of each month).

The **Amount** for each disbursement also displays. Payment will be split evenly.

If there is some reason payments should vary, you can edit the amounts.

In this example, we will change the first payment to \$1,200 and the second payment to \$800. The amounts should still add up to the total amount awarded to the student.

We'll also look at Gabriella's NRST payment which is scheduled to pay twice, once each semester.

In this example, we will leave it as is and not make any changes.

Department Award
Gary GradStudent

ID	Date	Amount
1 01	08/01/2016	1200.00
2 02	09/01/2016	800.00
3 03	10/01/2016	1000.00
4 04	11/01/2016	1000.00
5 05	12/01/2016	1000.00
6 06	01/01/2017	1000.00
7 07	02/01/2017	1000.00
8 08	03/01/2017	1000.00
9 09	04/01/2017	1000.00
10 10	05/01/2017	1000.00

Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1	945100032470 Department Award	Gary GradStudent	MB	MB	10000.00
2	945100039290 Department Award	Gary GradStudent	AY	FS	7551.00
3	945100032470 Department Award	Gabriella GradStudent	MB	MB	10000.00
4	945100039290 Department Award	Gabriella GradStudent	AY	FS	7551.00

ID	Date	Amount
1 01	08/15/2016	3775.50
2 02	01/09/2017	3775.50

Adding the Approver and Submitting the Batch Entry

Once we have reviewed the planned disbursements and made any edits needed, we are ready to assign this batch to a departmental Approver. Scroll up to the top of the page to the Approver field.

The screenshot shows the 'Department Awards' interface. At the top, there are fields for 'Institution' (UC Berkeley), 'Aid Year' (Federal Aid Year 2016-2017), and 'Career' (Graduate). Below these are 'Org Level 4' (SPH Divisional Rsrch and Cntrs) and 'Award Batch' (SPH DEPTAWARD JULY16 XX). The 'Status' is 'Pending'. The 'Approver' field is highlighted with a red box and contains a search icon. Below the header, there are two tables: 'Awards' and 'Students'. The 'Awards' table has columns for Item Type, Advance Search, Description, Additional Info, Status, Amount, Charge Priority, Disburse Plan, and Split Code. The 'Students' table has columns for Student ID, Name, and Award Summary. At the bottom, there is a 'Disbursements' table with columns for Item Type, Student Award Description, Student ID, Disburse Plan, Split Code, and Award Amount. A 'Department Award' summary table is also visible on the right side.

Click the **Lookup Icon** to search for the Approver. The choices returned will be limited to your departmental Approver. Click the name of the appropriate approver.

The page now shows us the Campus Solutions ID# and the name of the Approver.

NOTE: Former UCB students will see their Student ID#, others will have a 10 digit id assigned to them by the system that starts with "30".

We will also see a message the approver has been notified (though technically they will only be notified once you Save).

Click **OK** to acknowledge the message.

The screenshot shows the same 'Department Awards' interface as above, but with a message box open on the right side. The message box contains the text 'Message' and 'Successfully notified the approver (26000,115)'. Below the message is an 'OK' button. The 'Approver' field is still highlighted with a red box.

We are now ready to save and submit this batch for review by our department's approver. We will scroll down to the bottom of the page and click the **Save** button.

The screenshot shows the 'Department Awards' interface. At the top, it displays 'Batch Number' and 'Department Awards'. Below this, there are fields for 'Institution' (UC Berkeley), 'Aid Year' (Federal Aid Year 2016-2017), 'Career' (Graduate), 'Org Level 4' (SPH Divisional Rsrch and Cntrs), and 'Award Batch' (SPH DEPTAWARD JULY16 XX). The status is 'Pending'. There are buttons for 'Comments', 'Created By', and 'Post'. Below the header, there are two main sections: 'Awards' and 'Students'. The 'Awards' section contains a table with columns: Item Type, Advance Search, Description, Additional Info, Status, Amount, Charge Priority, Disburse Plan, and Split Code. It lists two awards: one for 10000.00 and another for 7551.00. The 'Students' section contains a table with columns: Student ID, Name, and Award Summary. It lists two students: Gary GradStudent and Gabriella GradStudent. At the bottom, there is a 'Disbursements' section with a table for 'Apply Disbursements' and a 'Department Award' summary table for Gabriella GradStudent. A 'Save' button is highlighted in red at the bottom left.

Once we click the **Save** button, the Approver will receive an email notification that there is an award batch to review. We can still make edits up until the Approver takes an action on this batch.

The Approver will review and either *Approve* or *Reject* this entry. (Note: The Approver can't approve part of a batch, so for example, if there was an error with Gary's first award the entire batch would need to be rejected.)

Once approved, these awards would be part of an automated process that will update and show on the student's Awards page in Financial Aid and would show to the student in CalCentral as a planned disbursement.

If you are done assigning awards, use the menu to navigate to a new page or click **Sign Out**. When you are finished, make sure to exit the browser as well. Do not leave open browser windows unattended.

Support

For questions or assistance, please SIS support.:

- Call 510-664-9000 (press option 6 to reach SIS support)
- Email: sishelp@berkeley.edu
- Submit a ticket: https://berkeley.service-now.com/ess/create_incident