Department Award Entry

Path: Cal Components > Financial Aid > Award Entry

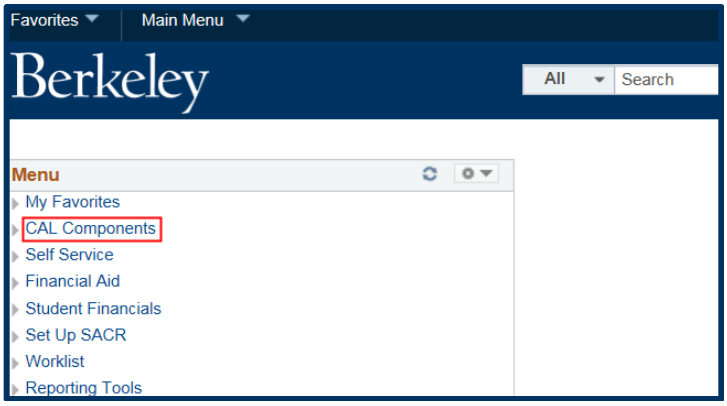
Department Awards allow departments to add a variety of awards to a student's financial aid package. This was previously done in *DSAS*, but will now be done in *Campus Solutions*.

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.

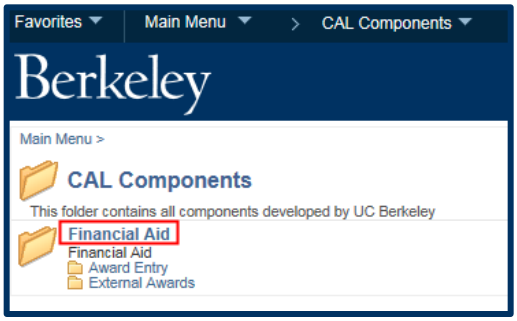
After logging into Campus Solutions, use either the top menu or the left hand menu.

Click the Cal Components link.



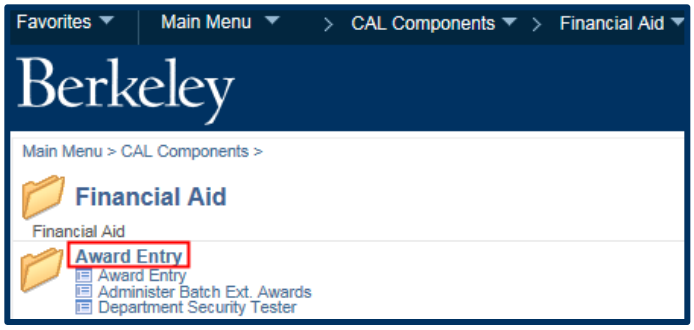
Click the Financial Aid link in the Cal Components folder.

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

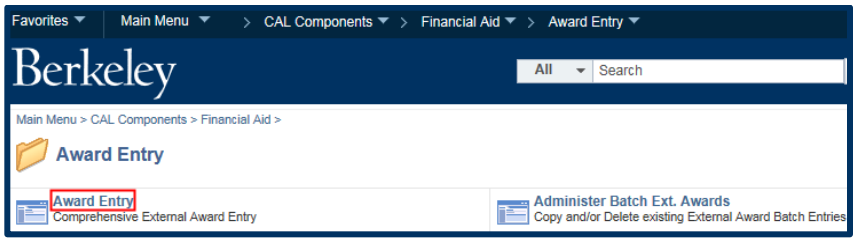


Click the Award Entry folder.

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



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

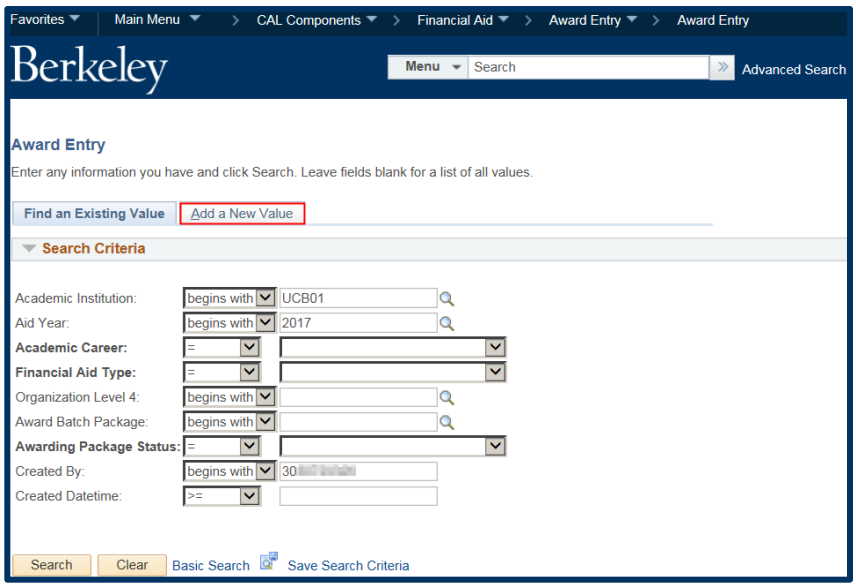


The **Award Entry** page displays.

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

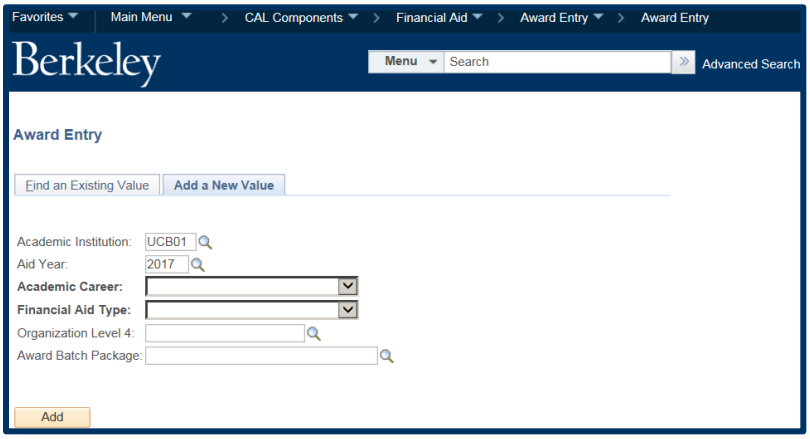
The first page defaults to Find an Existing Value, where we could look up existing awards.

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.

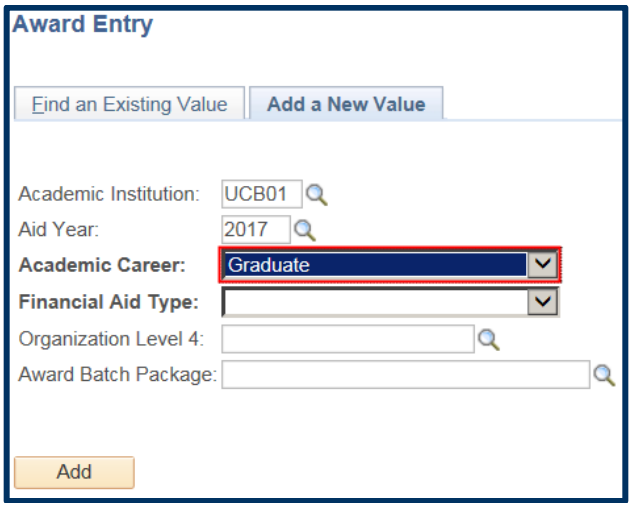
Now we will need to specify some information about the award(s) we are about to enter.



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).

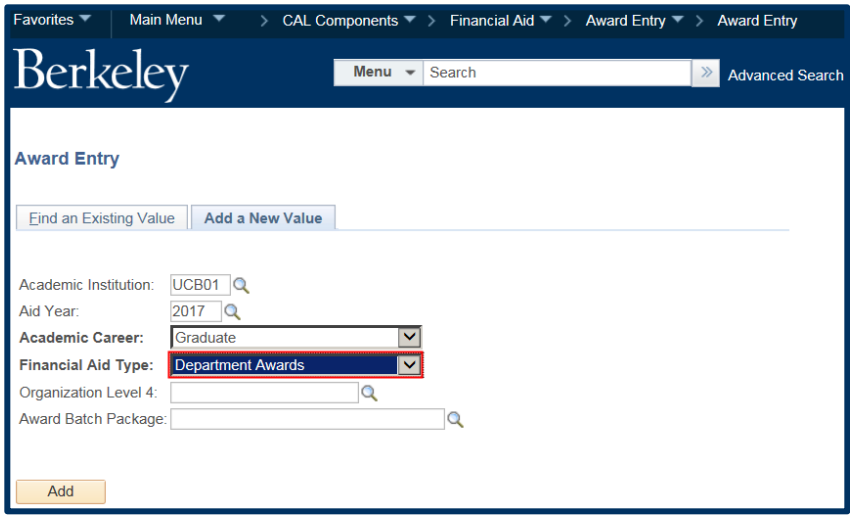
In this case we will select *Graduate* from the drop-down list.



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).

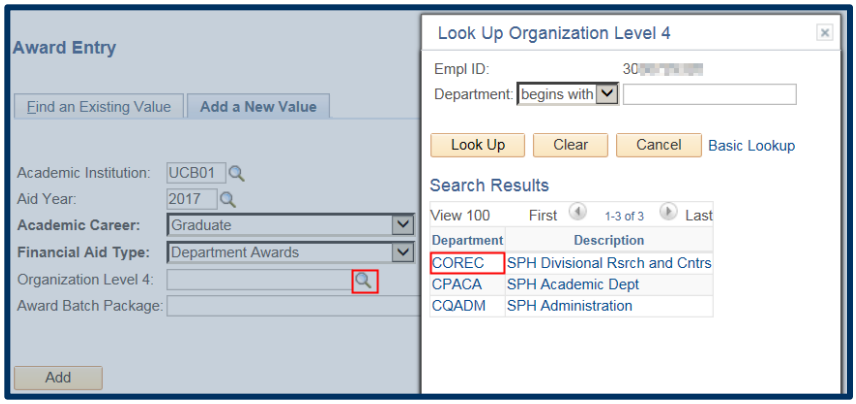
Note: Depending on your access you may only have one of the choices in your menu.

In this example, we will select Department Awards.



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.



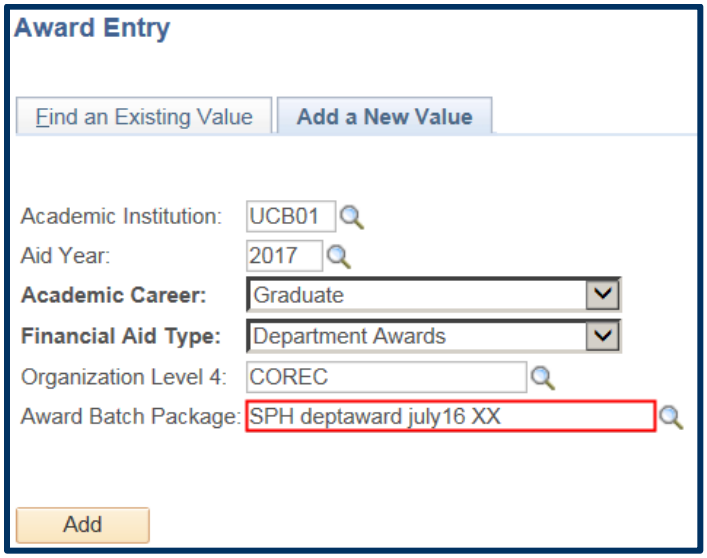
In this example, we will click on the department (*COREC*) we wish to award for.

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

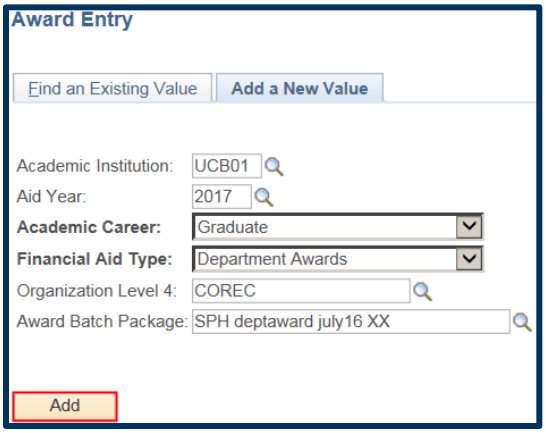
For example, if we were preparing some stipends for a professor's students, we could name the batch "Prof Lee stipends".

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.



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

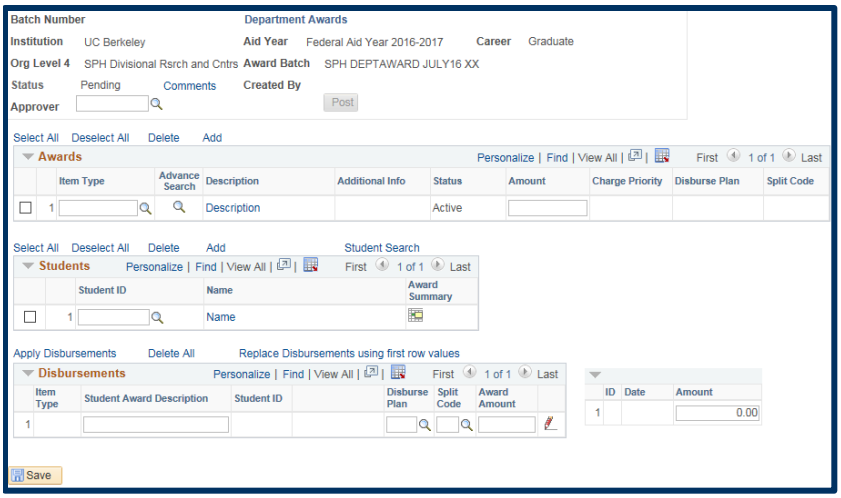


The Award Entry page displays. The top of the page shows summary information of the criteria entered earlier (Departmental Award, Aid Year, Career, etc.) The Status will always start as *Pending*.

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

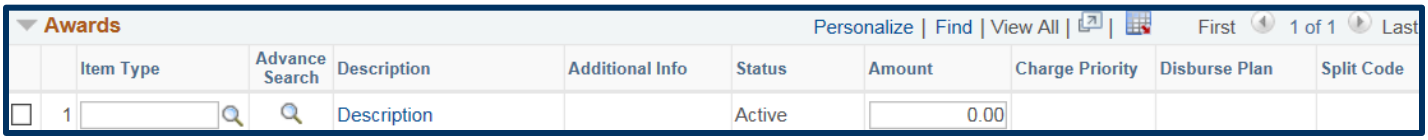
The Batch Number and Created By fields will fill in once we click Save.

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

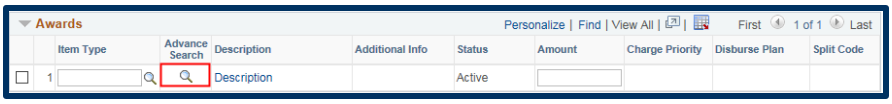


Adding the Awards

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.



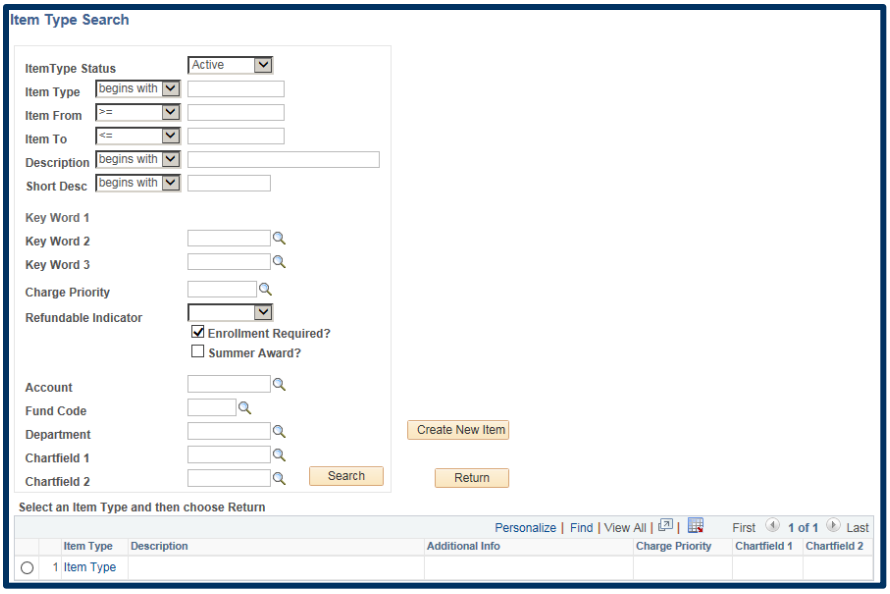
If you know which Item Type(s) you will be using, you can enter that directly in the Item Type field.



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.



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

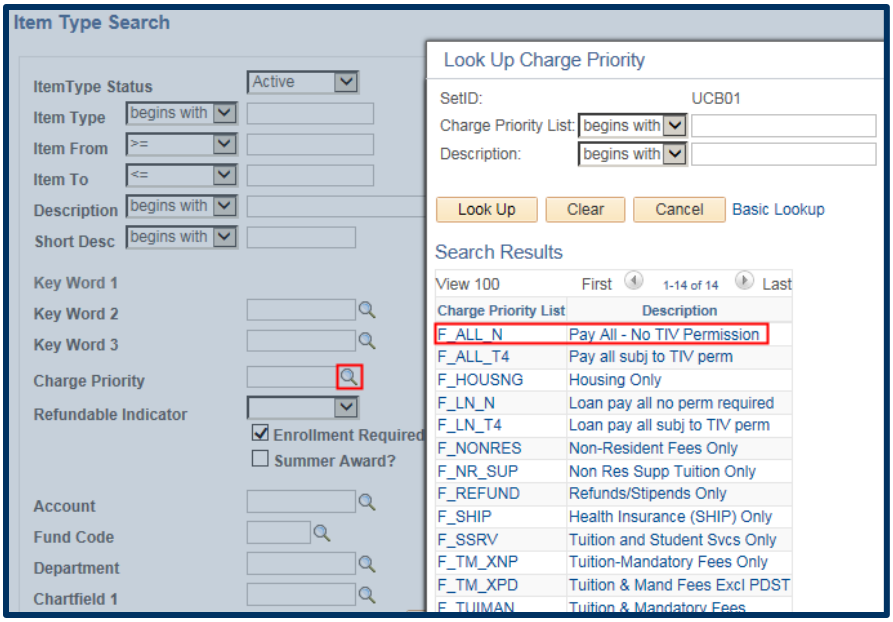
We've clicked the Charge Priority Lookup icon to see our options.

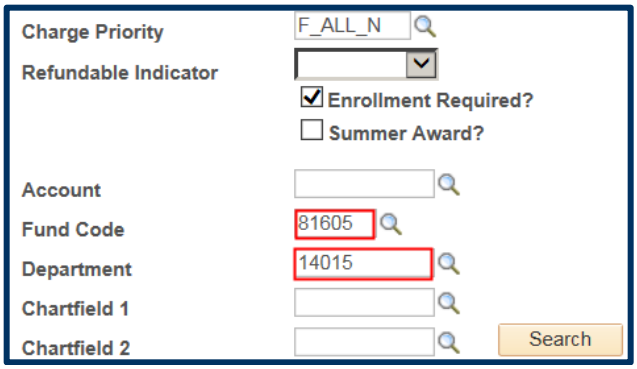
Please refer to the Charge Priority reference guide for a list of the Charge Priorities and definitions of what they will pay. It is recommended to use a broader Charge Priority (F_TUIMAN) than a restricted Charge Priority (F_NR_SUP) that will only pay 1 fee.

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

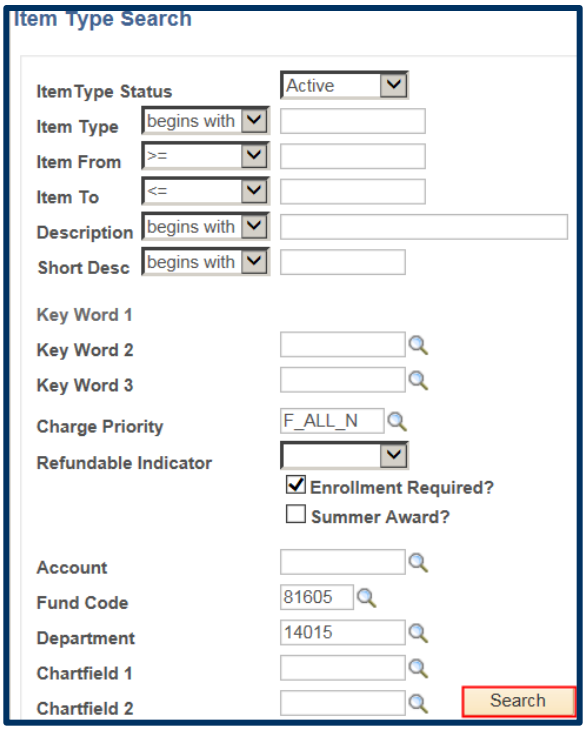
The most common search will be by chartstring values (e.g. Fund, Dept, Chartfield or some combination of these).

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





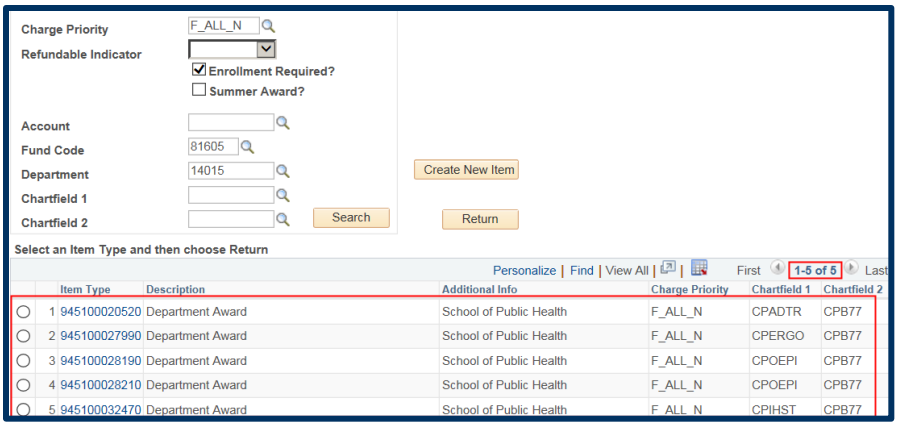
Now that we've entered our search criteria (chartstring information, Charge Priority), we will click the Search button to see if any Item Types match.



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

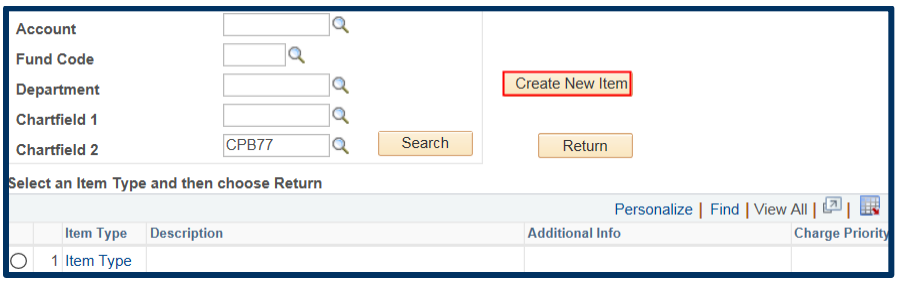
In this example we have 5 results that match our search.

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



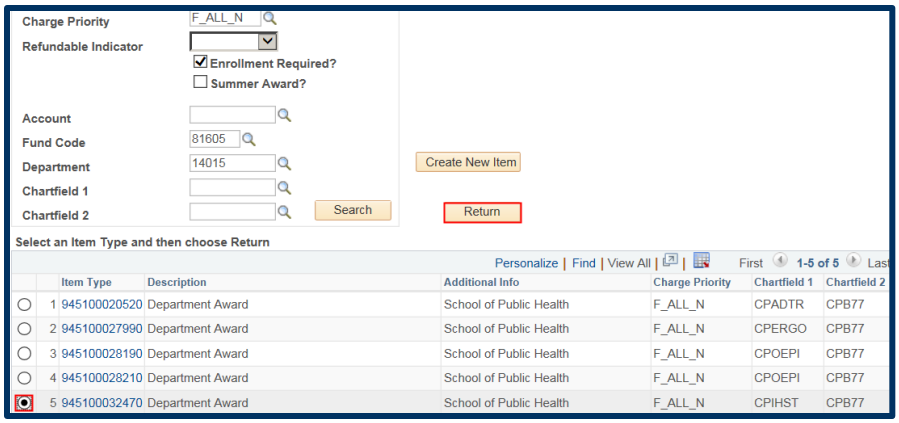
We could also click on the Item Type number to review the details (but this is not recommended unless you are familiar with Item Types).

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.



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.

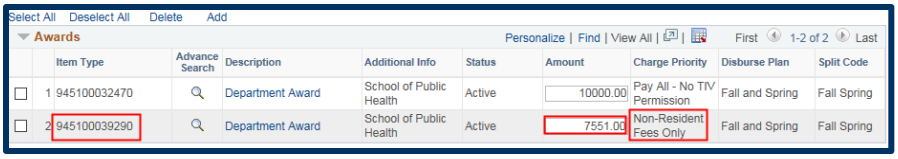
In this example, we'd like both of our students to each get $10,000 ($5,000 per semester).

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.

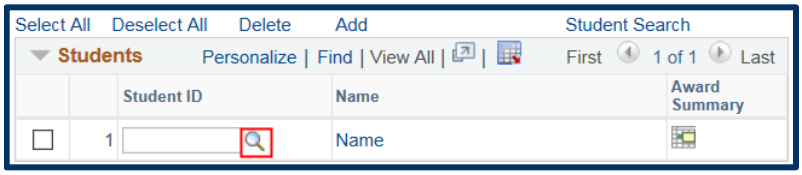


We could continue to add more Awards by clicking the Add link.

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

Adding Students

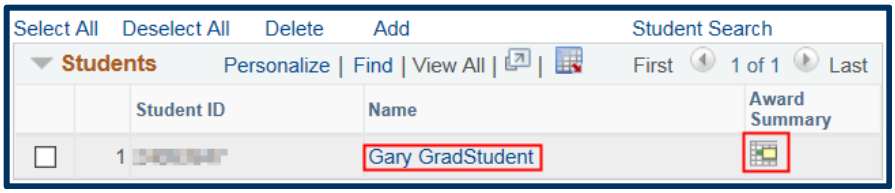
We will add the student IDs in the Students section below. If we did not have the SIDs, click the **Lookup** icon to search for students by First and Last Names.



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.



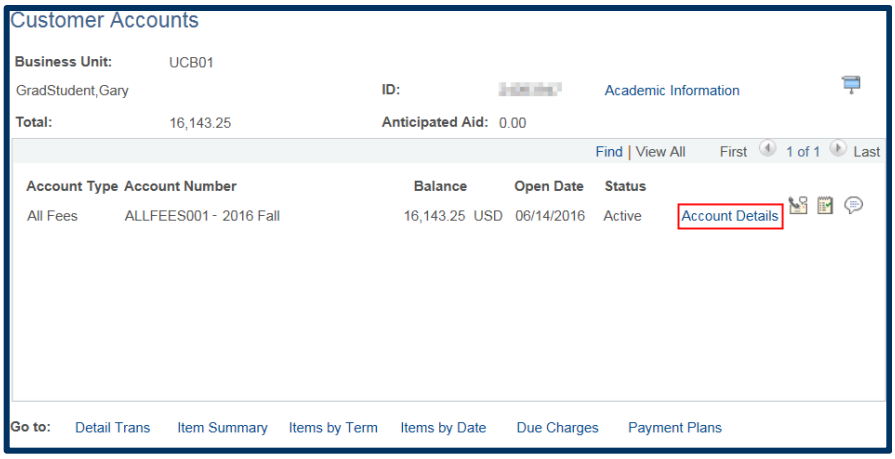
You can click on a student's name to see their billing summary (aka **Customer Accounts**) or click on the **Award Summary** grid to see their Financial Aid Award Summary.

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

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.

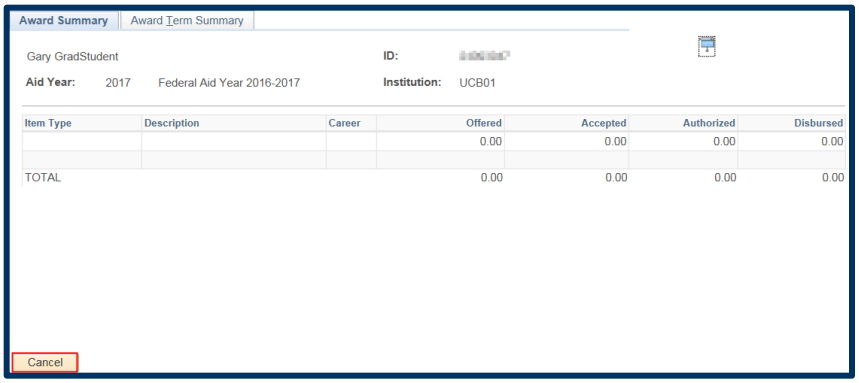


Financial Aid Award Summary detail page:

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.

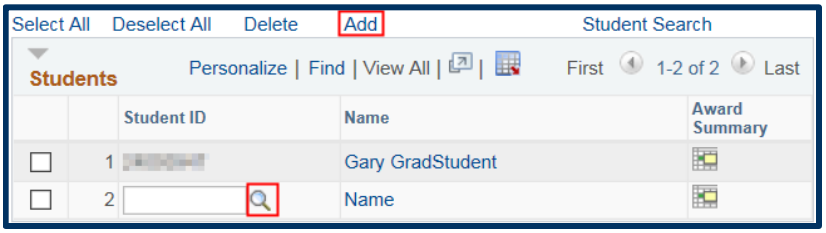
To return to the Award Entry page, make sure to click the Cancel button at the bottom of the page.



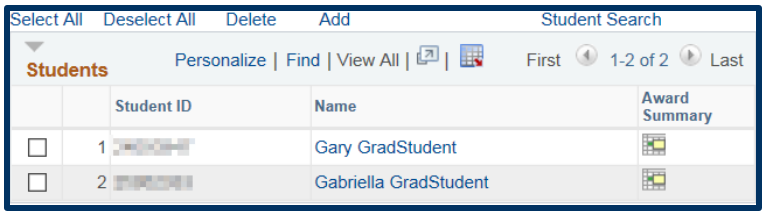
Warning: If you use the browser back button or the menus, you may lose all the work you have done so far.

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.

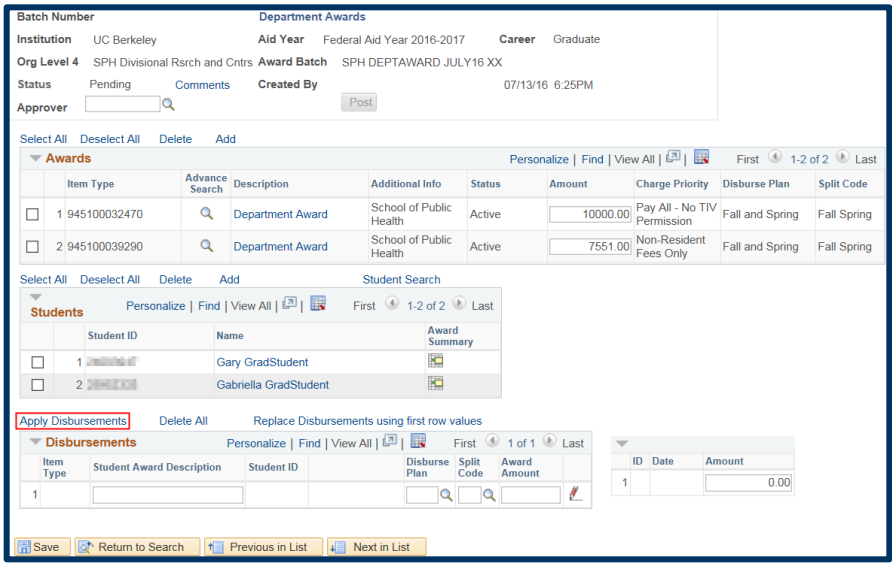
NOTE: At any point in this process if you need to save your work and exit this page, you could do so by clicking the Save button at the bottom of the page. Then when you return to the Award Entry page you'd use the Find Existing Value tab to find the pending award entry.

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.

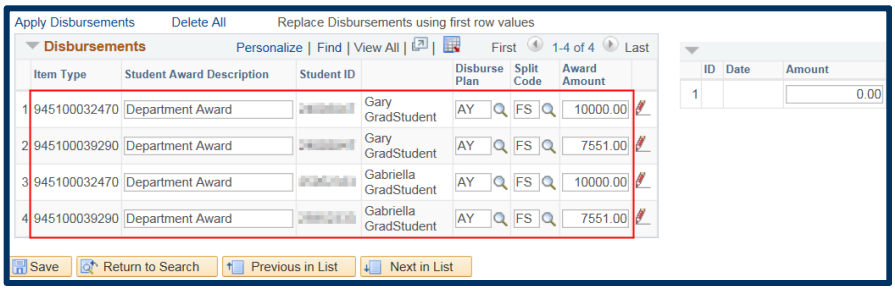


Once you have clicked the **Apply Disbursements** link each award will display for each student.

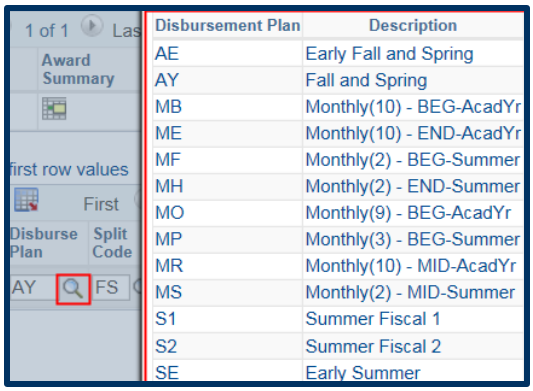
The default Disbursement Plan that was setup for this Item Type is **AY** = *Academic Year* which will pay a standard fall/spring disbursement (e.g. one stipend per semester)

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.



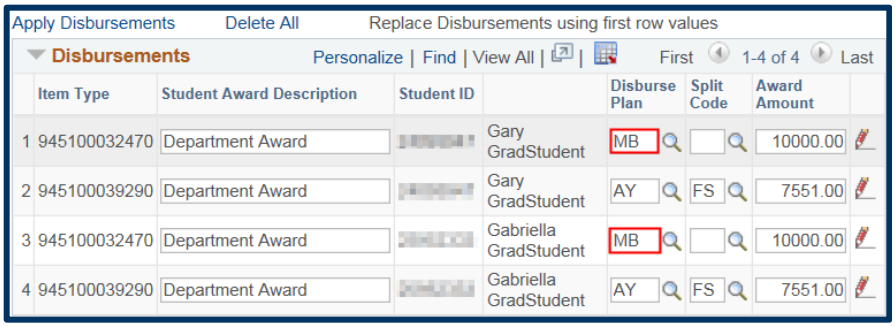
If you need to change the Disbursement Plan, either type in the new value or click the **Lookup icon** to select a different disbursement plan.



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.



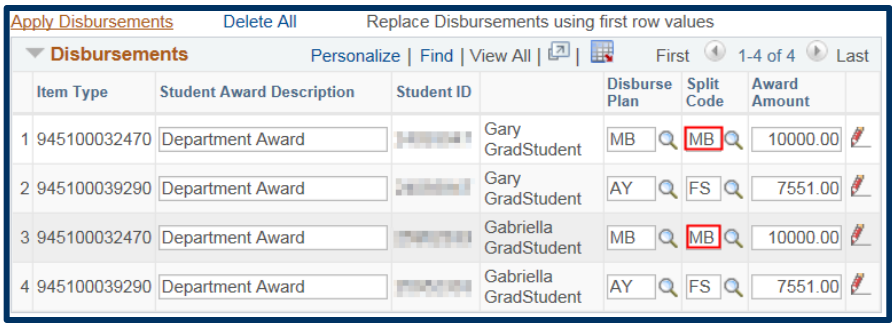
Once we enter a different disbursement plan the appropriate Split Code will also need to be entered. Split codes are conditional, meaning different ones may be used depending on which Disbursement Plan you have chosen.

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

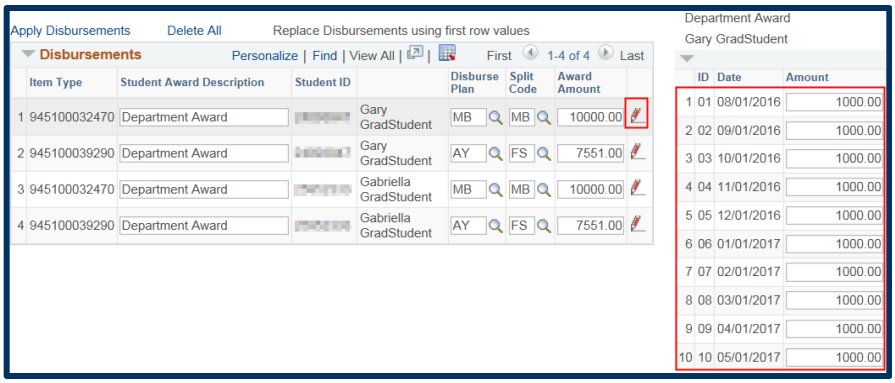
In this case we will choose **MB** so that our monthly payment pays for Fall and Spring.



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.



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

Apply Disbursements Delete All Replace Disbursements using first row values

Disbursements Personalize | Find | View All | First 1-4 of 4 Last

	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

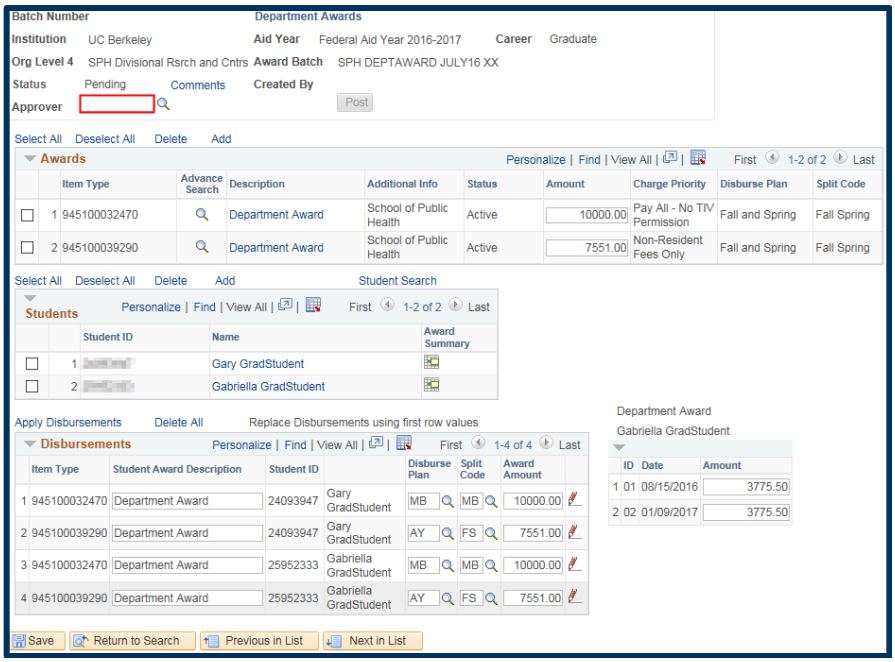
Department Award

Gabriella GradStudent

	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.



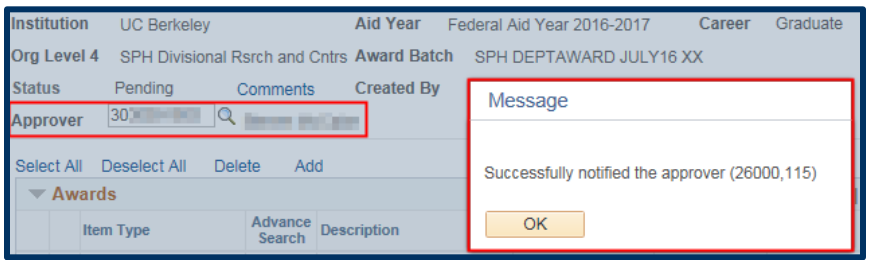
Click the **Lookup Icon** to search for the Approver. The choices returned will be limited to your departmental Approver. Click the name of the appropriate approver.

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

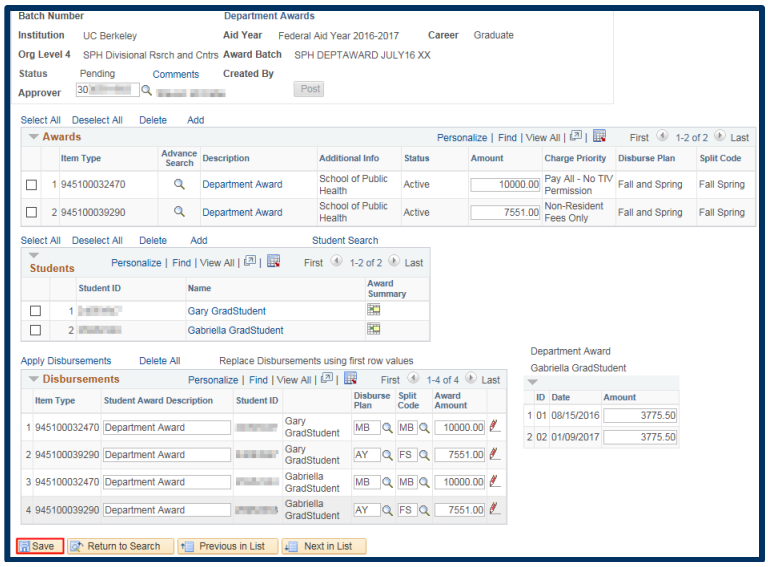
NOTE: Former UCB students will see their Student ID#, others will have a 10 digit id assigned to them by the system that starts with "30".

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.



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.



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**