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 via *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.
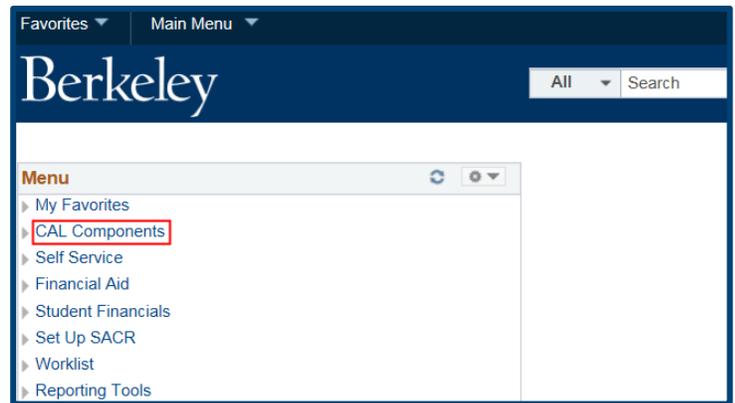
Click the **Financial Aid** link in the Cal Components folder.

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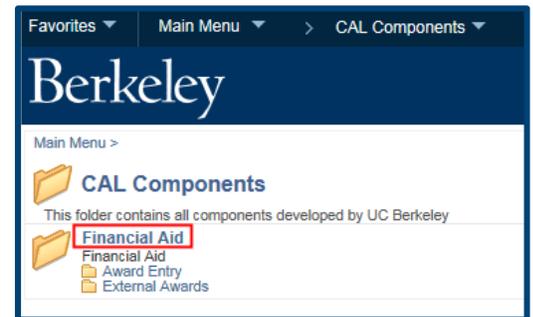
Click the **Award Entry** folder.

NOTE: From this view, you could also click directly on the Award Entry link.
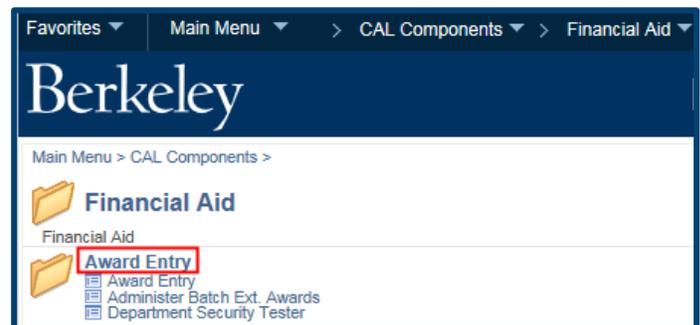
In the Award Entry folder, click the **Award Entry** link.
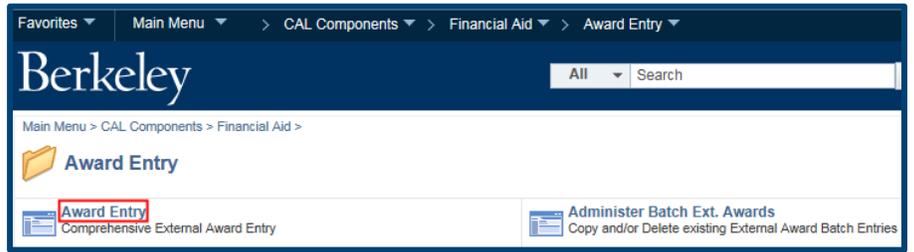
The Award Entry page displays.

Note: If you will enter awards regularly, consider clicking the Favorites link to add this page.
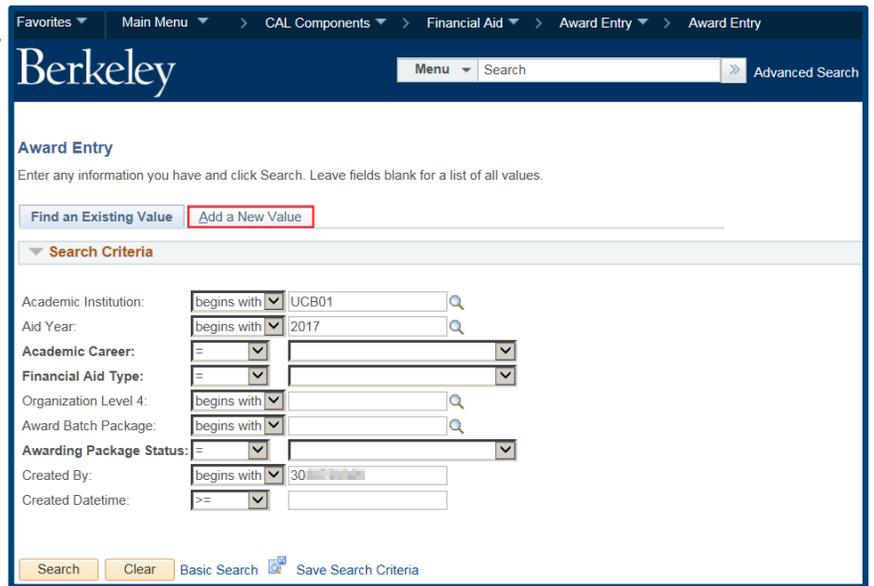
The first page defaults to **Find an Existing Value,** where we could look up existing awards.

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 need to specify some information about the award(s) we are about to enter.
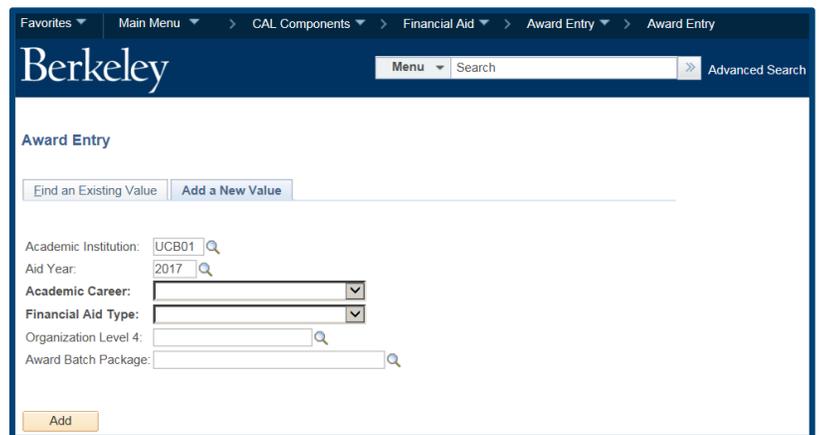
Select the **Academic Career** (*Graduate, Undergraduate,* or *Law*) of the student(s) who you will be making awards to.

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.

Award Entry

| Find an Existing Value | Add a New Value |

Academic Institution: UCB01
Aid Year: 2017
Academic Career: Graduate
Financial Aid Type:
Organization Level 4:
Award Batch Package:

Add

We have to specify if this is a **Graduate Division Award** (e.g. Block Grant or Departmentally Restricted) or **Department Award**.

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

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

Favorites ▼   Main Menu ▼ > CAL Components ▼ > Financial Aid ▼ > Award Entry ▼ > Award Entry

Berkeley   Menu ▼ Search   ▸▸ Advanced Search

Award Entry

| Find an Existing Value | Add a New Value |

Academic Institution: UCB01
Aid Year: 2017
Academic Career: Graduate
Financial Aid Type: Department Awards
Organization Level 4:
Award Batch Package:

Add

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.

Award Entry

| Find an Existing Value | Add a New Value |

Academic Institution: UCB01
Aid Year: 2017
Academic Career: Graduate
Financial Aid Type: Department Awards
Organization Level 4:
Award Batch Package:

Add

Look Up Organization Level 4

Empl ID: 30_____
Department: begins with ▼

Look Up   Clear   Cancel   Basic Lookup

Search Results

View 100   First ◁ 1-3 of 3 ▷ Last

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

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.

Award Entry

| Find an Existing Value | **Add a New Value** |

Academic Institution: UCB01
Aid Year: 2017
Academic Career: Graduate
Financial Aid Type: Department Awards
Organization Level 4: COREC
Award Batch Package: SPH deptaward july16 XX

Add

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

Award Entry

| Find an Existing Value | **Add a New Value** |

Academic Institution: UCB01
Aid Year: 2017
Academic Career: Graduate
Financial Aid Type: Department Awards
Organization Level 4: COREC
Award Batch Package: SPH deptaward july16 XX

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*.

Use the link to add **Comments** if you want 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.

Batch Number
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   Post

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
☐	1			Description		Active				

Select All   Deselect All   Delete   Add   Student Search
Students   Personalize | Find | View All | | | First   1 of 1   Last

		Student ID	Name	Award Summary
☐	1		Name	

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		ID	Date	Amount
1							1		0.00

Save

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. That is pretty rare though.

An Item Type is a 12 digit number that combines the funding source (chartstring) with a charge priority (what can be paid).

The easiest way to find the relevant Item Type is to click the second **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*.

Additionally, our search will also include chartstring values (e.g. Fund, Dept, Chartfield or some combination of these).

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

Note: When searching for a Summer Item Type, check the **Summer Award** box. Summer uses different Item Types, so this box <u>must be</u> checked to find the correct one.
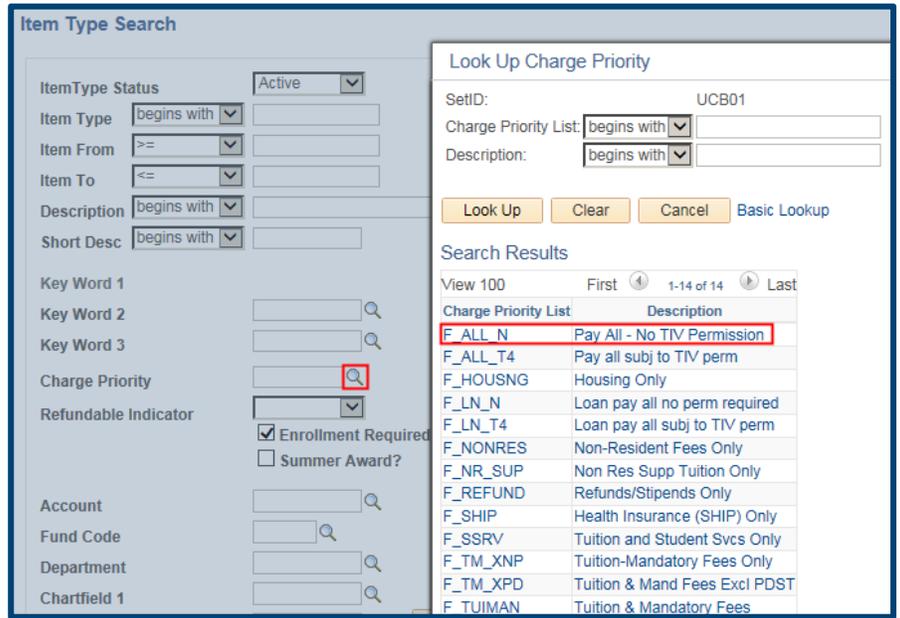
Item Type Search

ItemType 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
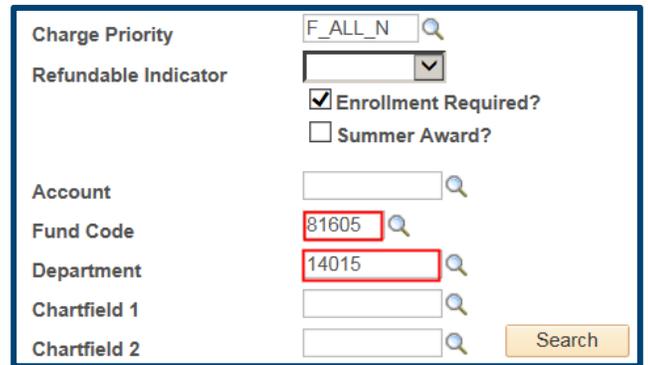
Charge Priority	F_ALL_N 🔍	
Refundable Indicator	▾	
	☑ Enrollment Required?	
	☐ Summer Award?	
Account		🔍
Fund Code	81605 🔍	
Department	14015 🔍	
Chartfield 1		🔍
Chartfield 2		🔍 [Search]

Now that we've entered our search criteria (chartstring and 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 (Acct, Fund, Dept and/or Chartfield1 or 2) and click **Search** again.

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

If we had <u>no</u> 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 and you'll need to click **Cancel**, to come back to this page.

Back on the **Award Entry** page, the **Item Type** number will display, along with the award name (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 this award to student(s).)

Now we enter the total **Amount** each student should get. (This field will copy into the Disbursement section below and can be edited per student if needed.)

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 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.

		Item Type	Advance Search	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 TIV Permission	Fall and Spring	Fall Spring
☐	2	945100039290	🔍	Department Award	School of Public Health	Active	7551.00	Non-Resident Fees Only	Fall and Spring	Fall Spring

Select All Deselect All Delete Add
Awards
Personalize | Find | View All | 🔲 | First ◀ 1-2 of 2 ▶ Last

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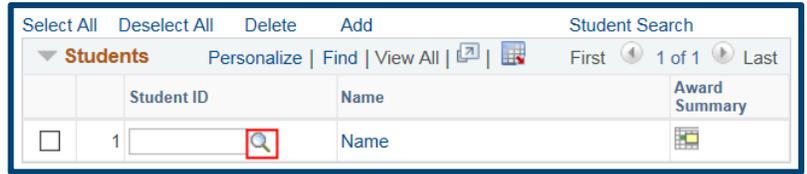
Remember to be careful to select the correct student, as there can be multiple people with the same name.

NOTE: Continuing students will have an 8 digit student id, new students entering in Fall 2016 and later will have a 10 digit student ids starting with "30".

We have added the first student.

We will click on a student's name to see their billing summary (aka **Customer Account**).
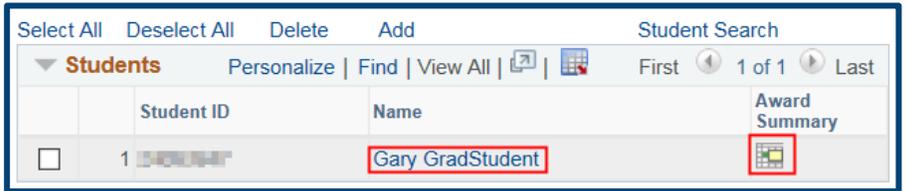
We will also click on the **Award Summary** grid to see their Financial Aid Award Summary.

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

Viewing Customer Accounts: (billing)

This is an optional step, but recommended to see what the student is being charged.

After clicking on the student's name, the **Customer Accounts** page opens up in another browser window.

Note: You can also go directly to this page by going to **Main Menu > Student Financials > View Customer Accounts**.

Click the **Account Details** link to see the detail of the student's charged.

Click the **View All** link on the Details page to see all the charges and amounts.

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

Financial Aid Award Summary detail page:

This is an optional step, but recommended to see what other financial aid the student is receiving.

The Award Summary page opens up on the same page (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 menu, you may lose all the work you've entered already.

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 for Summer Department Awards is **SM**.)

The default **Split Code** for Academic Year awards 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 desired.

If you wish 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
MJ	Monthly(9) - BEG-AcadYr
MR	Monthly(10) - MID-AcadYr
S1	Summer (May)
S2	Summer (July)
SE	Early Summer (Fees)
SM	Summer
SU	Monthly(3) - BEG-Summer
SV	Monthly(2) - END-Summer
SW	Monthly - MID-Summer

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.

We have clicked on "**MB**" from the list of choices in the **Disbursement Plans**.

	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.

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

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

	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	

Warning: The system considers awards for both Fall & Spring as part of the Academic Year. If you enter a "Fall only" payment on an Item Type (chartstring +charge priority) and then later try to submit a "Spring only" payment from the same source, it would override the Fall payment. (The system would think you changed your mind about the Fall payment and ONLY wanted Spring to occur in that year.) To add a spring payment on the same Item Type you used for a Fall payment, use the Split code of "FS" (or if using a monthly Disbursement Plan, one of the monthly Split codes that pays Fall & Spring) and add in the Fall AND Spring information. This will keep the fall payment as it occurred and will add the spring payment.

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.

Apply Disbursements   Delete All   Replace Disbursements using first row values

Department Award
Gary GradStudent

▼ 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	✎

	ID	Date	Amount
1	01	08/01/2016	1000.00
2	02	09/01/2016	1000.00
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

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

Department Award
Gabriella GradStudent

▼ 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	✎

	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 person.

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.

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.

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 fixed before approving.)

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**