Approving Departmental Awards

Path: CAL Components > Financial Aid > Award Entry > Approve Batch Entry

One approver is assigned to any Departmental Award batch entry. This departmental approver reviews and approves or rejects award entries to authorize disbursements of departmental awards to students.

Note: Users with both roles (the ability to both enter and approve awards) will not be allowed to approve a batch they entered.

Approvers are notified via email when there are awards to review.

NOTE: Approvers will not be able to Approve an award batch if there is a new Item Type still waiting for approval.

Before beginning, make sure that you have set your system defaults. This is an annual set up, which speeds up entry by defaulting fields like Institution and Aid Year. For more information refer to SetUp SACR Defaults for Financial Aid.

In this example, we will review and decide whether to approve or reject an award batch.

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

Click on CAL Components.
Click on the Financial Aid link in the CAL Components folder.

Click the Award Entry folder link.

Then click the Award Entry Approver link.

The search page displays.

If you have set up your system defaults, the Institution and the Aid Year will default.
You can search by a variety of criteria. Career will always be a required value.

In this example, we will enter Career (Graduate) and Org Level 4 (a.k.a Department) (COREC).

Click the Search button.

This will show all Pending batches for Graduate Students for that department.

Depending on how broad or narrow your search, there may be many results, only one or even none.

In this example, our search has returned 4 results. In this example, we’ll click on Batch Number 79 to review that batch.
We are now in the Batch Award Entry that our colleague entered.

The first thing we might want to check for is whether the Awarder left any comments. Click the Comments link.
The Comments and History will appear. In this example, we can see a comment, as well as see a history of the edits made to this batch. When we have finished reviewing the comments, click the OK button to return to the previous page.

Back on the Batch Awards page, we are ready to review this batch.

Review the Award(s)

Our first review should be the Awards section.

Review the Awards listed (correct funding source? the right charge priority?). Is the Amount correct? (Check for typos.)

In this example, there are 2 awards. We will click the Description of the award to validate the funding source.
We are now in the details of the Item Type, click the GL Interface tab to see the chartstring information.

The GL Interface tab page shows the chartstring information.

**Warning:** The Fund & Dept are in different order than usual (Dept first, Fund second).

When you have finished reviewing the Item Type information, click the Cancel button at the bottom of the page to return to the Award batch.

In this example, we have performed a similar check on the 2nd award.
Next we’ll check the **Amounts** to ensure they are correct. In this case, we have verified that the amounts are correct.

Next we’ll check the **Charge Priority** for each Award (which was determined by the Item Type that was chosen).

A Charge Priority indicates what charges incurred by the student will be paid for by this award. For more information and definitions, please see the [Charge Priority job aid](#).

In this example, we have verified these are correct. We want the Non-Resident Fees paid from one source and all other fees paid from another source.

We will examine the Disbursement plans and Split Codes in more detail below when we look at the planned disbursements.

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**Review the Student(s)**
Check that the correct students have been entered.

**Optional:** You have the ability to check a student’s billing summary and a financial aid summary.

To view a student’s billing summary (Customer Accounts) click their name.

To view a summary of a student’s Financial Aid awards, click the grid icon in Award Summary.

**Note:** If you have the ability to “View As” in CalCentral, you could view this information there as well.

The **Customer Accounts** page will open as a second browser window.

Click **Account Details** to see more information such as specific fees and amounts.
The **Account Details** page will show a breakdown of the fees being charged.

You may need to click the **View All** link to see all charges and payments.

Close the second browser window to return to the Award Entry page.

We can click on the Award Summary grid to see Financial Aid Award summary for a student.

The **Award Summary** displays. (Not as a separate browser window, so make sure not to close this window.)

This view is for the entire year. You can click the **Award Term Summary** tab to see a breakdown by semester.

In this example, there is no other aid awarded so far, so it is ok to proceed with our awards, there is no danger of an overaward.
However, if we had seen other awards given (e.g. $40,102), we’d need to consider whether it is appropriate to give this student another $17,551. If this would lead to an overaward, we might consider rejecting this batch.

After reviewing the Financial Award Summary pages, make sure to click the Cancel button at the bottom of the page to return to the Award Entry batch under review.

Using the browser’s back button or using the menus to navigate would lose the page and you’d have to search and go back in again.

Review the Disbursements
Back on the Award Entry page, we’re now ready to review the third section, Disbursements. We will check each line to review each award for each student to ensure the correct amounts are being disbursed on the correct schedule.

Previously we have reviewed the funding source, amount, student’s need and other factors. Now we are focusing on how and when these funds will disburse (via the Disbursement Plan and the Split Code).

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)

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

Make sure to click the red pencil next to EACH line to review the disbursement dates and amounts.

**Note**: The Amounts in the Disbursements section can vary from what was entered in the Award section. (e.g. Gary could receive $9,000 instead of $10,00)
We have clicked to view the 1rst award. Because the **Disbursement Plan is AY** (Academic Year), it’s a standard fall/spring disbursement that will pay once per term.

Because the **Split Code is FS** (Fall&Spring), this will pay in both Fall and Spring semesters.

**Dates** of disbursements show. In this case the 1rst payment will be Aug 15th, the 2nd will be on Jan 9th.

Dates are **NOT** editable.

If a disbursement date is in the past, the system will attempt to disburse as soon as possible after approvals.

Let’s click the red pencil next to the second line.

In this example, the **Disbursement Plan of MB** (Monthly, beginning of month) was chosen and the corresponding **Split Code of MB** (Monthly for Fall & Spring)
Disbursements are usually split evenly. However in this case the Aug 1 payment shows as $1200 and the Sept 1 payment shows as $800, so the Awarder must have made a manual edit.

In this example, the Awarder left us a comment explaining why they made an edit.

Check the amounts to ensure they are correct and add up to the total amount ($10,000).

In this case there are no issues with this payment, so we will click the next red pencils to inspect the 3rd and 4th lines as well.

Approvers cannot edit the information. It is also not possible to approve just part of a batch, so if we found that Gary’s awards were ok, but Gabriella’s awards were not, we could not Approve the batch.

Rejecting a batch closes it for updates, so if there are errors, stop your review, contact the Awarder and have them make corrections, then come back in and Approve the batch once it is correct.

**Approving an Award Batch**

In this example, we have determined that these awards are coming from the correct funding source, for the correct amounts, that they are appropriate for these students and that the disbursements are set up correctly. We are ready to approve this batch.
Scroll up to the top of the page.

**Optional:** If you’d like to leave comments, click the Comments link.

In the Status drop-down, change the status from Pending to Approve.

The Status will change to Approve and a pop-up message will confirm it’s ready to be posted and remind us to click the Post button.

Click the OK button to acknowledge the message.

Since the awards are correct, we will click the Post button.

**NOTE:** If there are questions about an award batch, do not click Post. Once Posted, it’s harder to make edits.

For changes after Posting, a revision would be needed. (See the Revisions to Posted Awards job aid for more information).
The system will process this request.

The Status changes to Posted.

The word “Saved” will flash in the upper right corner for a few seconds, and a message will popup confirming this has been posted to external awards tables.

Click OK to acknowledge the message.

The Post button has greyed out, and a Posting Date has appeared.

A record of the date, time and approver will show in the Comments & History section, if you click the Comments link.

We have successfully Approved andPosted these awards.

A process will run once a day to move the awards into the student’s aid package and will soon display to the student on CalCentral My Finances page.
Rejecting an Award Batch

In the following example, while reviewing a batch of NRST (Non-Resident Student Tuition) payments, there appear to be some errors in the Awards, Students and Disbursements sections.

The wrong amount for a NRST fee was entered ($77,551 instead of $7,551). Also while reviewing one of the student’s billing summary (Account Details) we saw they were being charged Resident Tuition, not Non-Resident, so they are not eligible for to have Non-Resident fees paid. Finally, we see that the Split code was changed to FL – FALL ONLY so the entire annual amount would pay for 1 semester.
We now have a choice to suspend our review and ask the Awarder to fix these errors or to Reject this batch.

If we reject this batch, the Awarder will not be able to edit the batch and would need to copy and revise the batch or create an entirely new batch.
In this example, we’ll decide to Reject this batch.

First we should leave some comments to explain why we are rejecting this batch.

Scroll up to the top of the page and click on the Comments link.

We have pointed out the things we feel are incorrect and suggested the corrections needed.

To return to the previous page, click the OK button.

Back on the batch award page, we will now change the Status from Pending to Reject.
Then scroll down to the bottom of the page and click OK to save this change and reject this batch.

Back on the search page, click the Save button.

The Awarder would now have to copy this batch and do a Revision to submit it again or would have to start an entirely new batch.

If you are done approving 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 contact 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