Approving Departmental Awards

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

One approver is assigned to a 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, ensure 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 right hand navigation icon.

Click on CAL Components.

Click 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 system defaults, the Institution and the Aid Year may default. Fin Aid Type will default to Department Awards.

Aid Year, Career, Fin Aid Type, and Org Level 4 (Department) are required values.

If you know the Batch Number, enter that as well, to go directly to that batch.

In this example, we have filled out the required fields, but will leave the Batch Number blank, and search for all award batches pending our approval.

Click the Search button.
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 2 results. We’ll click on Batch Number 14684 to review that batch.

We are now in the Award Entry batch that our colleague entered.
The first thing to check is whether the Awarder left any comments.

Click the Comments link in the top section.

The Comments and History appears.

In this example, we can see a comment, as well as 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 Award Entry batch page.

Review the Award(s)

Our first review should be the Awards section.

Review the Awards listed. Check the funding source (chartstring) and amount. Check the Charge Priority for each Award. A Charge Priority indicates what charges incurred by the student will be paid for by this award and how the funds will disburse (to the bill or to the student). For more information and definitions, please see the Charge Priority job aid.

In this example, we have verified these are correct. We want to pay a $1,000 Stipend to each of the students and $24,550 towards Tuition & Mandatory fees.

We will examine the Disbursement plans and Split codes in more detail below when we look at the Disbursement details.

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

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

To see a student’s bill (**Customer Accounts**) click their name.

**Note:** If you have “View As” ability in **CalCentral**, you can see this information there too.

The **Customer Accounts** page opens in a new 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. You may need to click the **View All** link to see all charges and payments. For more information see the **View Customer Accounts** job aid.

Close the second browser window to return to the Award Entry page.
To view a summary of a student’s Financial Aid awards, click the Award Summary grid icon.

The Award Summary opens in a new 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, this student has a Block Grant and other Department Awards, so we want to ensure this extra payment will not cause an over-award.

After reviewing the Financial Award Summary pages, close the second browser window to return to the Award Entry batch.

Review the Disbursements

Back on the Award Entry page, we’re 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. We will also doublecheck whether previous payments have been processed for the student on an Item Type (which is a specific combination of funding source and Charge Priority).

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).

Disbursement Plans control when and how often an award will disburse. The most common choices are a single payment per semester (e.g. AY in Fall and/or Spring or SM and S1 in Summer) or a Monthly disbursement (e.g. MB = beginning of each month in Fall/Spring, for 5-10 months or SU = Monthly, beginning of month in summer).

Split Codes are conditional, depending on the Disbursement plan and they designate if the award will be for Fall only (e.g. FL or MF), Spring only (e.g. SP or MS), Fall & Spring (e.g. FS, MB, MR, ME, etc.) or Summer (SM, S1).

Another consideration is whether we have already given money on a particular Item Type during the same Academic Year (which counts both Fall and Spring) or during the Summer. If so, an amount will show in the Existing Amount field.
Example: If we saw that a student has already received an amount on an Item Type (the combination of charstring & charge priority), this batch would be considered a “revision” of a previous award. If a student already received $5,224.00 and we submitted another award for $1,000, on the same Item Type (same chartstring, same Charge Priority) for the same Academic Year, the new amount supersedes the original.

- If we submit a $1,000 award on this Item Type, the original $5224.00 would be reversed and the student would receive only $1,000. (even if that original amount was coded as Fall only (Split code FL) and we submitted a Spring only (Split code SP) award, because they system considers Fall & Spring, so it would think the Fall only payment was no longer valid and that we were instructing it to ONLY pay the student in Spring.

- If we wish to add an additional/thousand dollars, then we would submit an award for $6,224.

To research a student’s previous batch, we could search the student to see their previous batches. See the Search Student’s Awards job aid for more information.

In our example, none of the columns have an amount in the Existing Amount column, so we do not need to worry about this being a revised award.

Click the red pencil next to each line to review the specific disbursement dates and amounts.

Note: The Amount in the Disbursements section can vary from what is in the Award section.
We have clicked to view the 1rst award.

In this example, the Disbursement Plan of ME (Monthly, end of month) was chosen and the corresponding Split Code of ME (Monthly for Fall & Spring).

There are 10 monthly payments now showing.

Check the amounts to ensure they are correct. In this case the award amount is $1,000 and we have 10 monthly payments of $100.

**Date** of each disbursement:

Dates are NOT editable.

If a date is in the past, the system disburse as soon as possible after approval.

**Amount** of each disbursement:

Amounts default to split evenly. (e.g. 1,000 divided by 10 is $100 each month.)

However manual edits can be made (e.g. pay $50 one month, $150 the next.)

A month can even be left blank (as long as they add up to the total amount). E.g., August could be blank but September could disburse $200.
Click the red pencil next to the second line.

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.

Note: The Amounts in the Disbursements section can vary from what was entered in the Award section. (e.g. Gary receives $500 instead of $24,500)

Dates of disbursements show. In this case the 1st payment will be Aug 14th, (or the closest day after if this is retroactive) and the 2nd will occur Jan 8th.

Amount: Disbursements are usually split evenly. However in this case a manual change was made.

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 Greg’s awards were ok, but Gracie’s awards were not, we could not Approve the batch.

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

Approving an Award Batch

Once we have determined that 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, then we are ready to approve a batch.

However, if errors had been found: We 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. So this is not recommended.
Scroll up to the top of the page.

**Optional:** 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 changes.

For changes after Posting, a revision would be needed. See the Revising a Posted Award Batch 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 and Posted 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.

Support:
For questions or assistance, please contact: awardentry@berkeley.edu