Graduate Division Award Entry

Path: Cal Components > Financial Aid > Award Entry

Departments can award certain types of Graduate Division and other Berkeley awards to students (e.g. Block Grants and Departmentally Restricted Funds). These awards are approved and posted by the Graduate Division office.

For information about policy, guidelines and restrictions on Graduate Awards, please visit the Graduate Division website.

Before beginning, it’s recommended to set your system defaults. For more information, refer to the Set Up SACR Defaults (Financial Aid) job aid.

This job aid covers how a department enters a Graduate Division award(s) to one or more students in a batch. In this example, we will enter a Block Grant award to two students.

After logging into Campus Solutions, use either the top menu or the right hand navigation icon.

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

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The **Award Entry** page displays.

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 a New Value** tab.

The **Add a New Value** page displays.

Because our system defaults have been setup, the **Academic Institution**, **Aid Year**, and **Academic Career** have defaulted, otherwise we would need to enter those.

In this example, we only have access to enter Graduate Division Awards, so the **Financial Aid Type** has defaulted to **Graduate Division Awards**. If you also have access to enter **Department Awards**, you will need to specific which type you are entering.

Next, we'll need to select the department we are entering awards for.

Either enter the 5 digit **Department** code or click the **Lookup Icon** to the right of the **Organization Level 4** field. The choices depend on your security. Some people have access to only one department, some may have a multiple.

In this case, we'll click on **HENGL**.
We must name this batch. If multiple people in your department prepare awards, consider discussing a naming convention.

**Note:** Names must be unique and there is a 30 character limit.

In this case, we will enter a title of “English Block Grant 17-18” in the **Award Batch Name** 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 (Graduate Division Awards, Aid Year, Career, etc.) The **Status** starts as Pending.

There is a link to add Comments if desired.

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

We'll come back and select our 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.

An Item Type is a 12 digit number that combines the funding source (chartstring) with a charge priority (how the funds will be applied).

The easier and recommended way to find the relevant Item Type is to click the Lookup Icon under Advance Search.

The Item Type Search page displays.
The most common search criteria for Grad Div awards will be by **Charge Priority** and a **Short Description** search. (The **Keyword 3** field can also be used to find Departmentally Restricted funds.)

A Charge Priority indicates whether the funds will be disbursed directly to the student or whether they will apply to certain charges on the student’s account. For more information, see the **Charge Priorities job aid**.

We’ve clicked the **Charge Priority Lookup Icon** to see the options.

In this example, we would like to give a stipend that will pay directly to the student(s). Therefore, we will select **F_REFUND**.

**Note:** The code “refund” does not mean this is a reimbursement. **Refundability** refers to whether an amount may be disbursed to the student. By selecting **F_REFUND**, we’re indicating that the amount should be disbursed to the student, regardless of any charges on his/her account.

We will use the **Short Description** field to look up our department’s **Block Grant**.

**Block Grants** will always start with **BG-** (dash).

**Departmentally Restricted** funds can be found by searching for **DR-** (dash) or looking up the name of the award by using the description lookup in the **Keyword 3** field.

In this case, we are awarding a Block Grant, so we will enter **BG-** and then click the **Search** button.

**Note:** When awarding for Summer make sure to also click the **Summer Awards** checkbox.
Our search results display one matching Item Type.

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 to continue adding the Award.

**Note:** If you accidentally click the **Item Type** number, click **Cancel**, to return to this page.

Back on the **Award Entry** page, the **Item Type** number will display. A description of the award and the department. (e.g. **Block Grant Award-English**). We can also see the **Charge Priority** (**F_Refund**) for the **Amount** awarded.

The default **Disbursement Plan** and **Split Code** will also display.

Enter the total amount each student should get.

In this example, our department will give $1,000 to each student for the year ($500 per semester).

Next we decide 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, 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**).

In our example, we wish to pay this stipend monthly to all students, so we will change the defaults of the **Disbursement Plan** (**AY** = one payment per term in the Academic Year) and **Split Code** (**FS** = Fall & Spring).
Note: These codes can also be changed in the Disbursements section below.

Click the Disbursement Code Lookup Icon to see the choices.

We will select “ME” which will pay these students Monthly, at the end of each month, for 10 months.

Note: Since we have not selected a Summer Item Type, we will not see Summer Disbursement codes.

Click the Split Code Lookup Icon to see the choices. Split codes are conditional, so we only see the choices available for “ME” Disbursement Plan.

We will select “ME” to indicate this is for Fall and Spring.

In this example, we have added 1 award, however, you can add multiple awards in the same batch, as long as they are also Graduate Division Awards and will apply to all the students we will add below.

If needed, add another award by clicking the Add link. A new line would appear. You would use the Advanced Search lookup to find the 2nd Item Type, then add in an amount.

Note: The order awards are added does not matter, the system will determine what gets applied first based on the Award type and the Charge Priority.
Adding Students

In the Students section, add the Student ID or click the Lookup Icon to search for students by Name.

After adding the first student, click the Add link to add more students.

We have added two students.

Click on a student’s name to see their Customer Account (billing information).

Click on the Award Summary grid to see a Financial Aid Award Summary.

Customer Accounts:

The Customer Account (billing summary) page opens in another browser window.

Click Account Details for specific fees.

Account Details:

The billing details page displays.

Click the View All link for all charges and payments.

Close the browser window, to return to our Award Entry batch.

Financial Aid Award Summary:

Award Summary opens in a new window.

This displays planned aid. Click the Award Term Summary tab for a breakdown by term.

Gracie has no aid showing, so we can proceed without worrying about over-awarding.

*Another student with awards might show...

To return to the Award Entry page, close the browser window.
Apply and Edit Award(s) to Students

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

This will apply the amounts entered from the awards chosen to each of the students and will show the details of the disbursement(s).

It’s recommended to do this step after all the awards and all the students have been added.

Once you have clicked the Apply Disbursements link, each award will display for each student, based on the information we entered above. We can still make changes to individual students in this section.

An important consideration is whether we have already given money to a student on a particular Item Type during the same Academic Year (which counts both Fall and Spring) or for 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 supercedes 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, neither student has an Existing Amount already indicated, so do not need to make adjustments for that.

In this example, we'll change Greg's Disbursement to MB = monthly beginning of month, and the Split Code to MF, Fall only).

We can also adjust amounts individually. If Greg was only going to be here in fall and should get half the award, we can change that amount in this section.

If the change we made should apply to all the other students in the Disbursements section we could click the Copy Disbursement From link to replicate the change.

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) for Greg 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.

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 Greg's information.
The **Date** of scheduled disbursements will show.

If an award is entered after the first disbursement date, retroactive disbursements will occur as soon as possible.

Dates cannot be edited. 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. Payments will be split evenly by default, but you can edit the amounts for each month (e.g. We could pay Greg $50 in August and $150 in September) - so long as the totals add up to the amount ($500).

Now we will review Gracie’s disbursement information. We will click the red pencil icon 🆕 to see the details.

The dates cannot be changed, but we could edit the amounts if appropriate.

Because Gracie’s Disbursement Plan and Split Code are MB and MB, she is set up to get 10 monthly payments, at the end of the month for Fall & Spring.
Adding an Approver and Submitting the Batch Entry

Once we have reviewed the planned disbursements and made any edits needed, we are ready to leave comments (if desired) and assign this batch to our Approver in the Graduate Division.

Scroll up to the top of the page.

If you’d like to leave comments for the Approver, click the **Comments** link.

After adding comments, click the **OK** button to return to the Award Entry page.

We also have to click **OK** to acknowledge a message reminding us that no Approver has been chosen yet.

Now we are ready to add our Approver.

Click the **Lookup Icon** to search for an Approver.

Find and click the name of the appropriate approver in Graduate Division that your department works with.

The page now shows us the Campus Solutions ID# and the name of the Approver.
We are ready to save and submit this batch for review by a Graduate Division Approver. Scroll down to the bottom of the page and click the **Save** button.

Then acknowledge the message that the Approver has been notified, by clicking **OK**.

We can still make edits up until the Approver takes an action on this batch.
Graduate Fellowships will now review this batch. After they do so, the status of this batch will change to “GD Processed” and you may see another batch for the entry that Graduate Division does (they will be changing the item types).

Once approved/processed by Grad Division, 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.

For questions, please email: awardentry@berkeley.edu