# Award Entry Q&A

These answers have been developed by the Financial Aid & Scholarships Office and SIS Training to address questions from staff submitted during the Award Entry webinars. We will continue to update this document with new answers as we receive additional questions.

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**Search Information**

**Question: Is there a way to look up a specific student’s list of awards received?**

 Answer**:** Yes, you can access the Award Term Summary page for each student when you are on Award Entry page) or you can also go to the [View By Date](http://sis.berkeley.edu/sites/default/files/awards_viewbydate_formattedfeb17-2_0.pdf) page (In the Financial Aid menu)

**Data Prior to Fall 2016**

**Question: Will the previous awards from past years be imported into the new system?**

Answer**:** No. All awards prior to Fall 2016 will remain in DSAS.

**Question: Will DSAS still be available for view-only so departments can see awards pre-FY16?**

Answer: Yes.

**Data Entry**

**Can we save Award Entry first before selecting the approver?**

Answer**:** Yes. You only have to fill out an Approver when you are ready to send the Award for review and approval.

**Question: What does “No TIV” or “TIV” mean in the Charge Priorities?**

Answer**:** It’s related to Federal Financial Aid. Do not uses the “TitleIV” option - you are not awarding Federal financial aid funds. (It may eventually be removed from the list of options).

**Question: If an approver rejects a batch, can it be edited and resubmitted or would it need to be re-entered again?**

Answer**:** Rejection closes it to further entry, so it would have to be reentered again. Approvers are encouraged to reach out to the person who entered the batch to make corrections before changing the status.

**Question: How many students can be added on a batch at once? What is the limit?**

 Answer**:** No limit.

**Question: Will the email to Approvers contain specific batch numbers that need to be approved?**

 Answer**:** Yes,it should. (As of now the emails to approvers are not firing, but it should be fixed in the next few days).

**Question: Can we batch load student IDs via an excel file to make dept. awards in mass?**

Answer**:**  No, there is no upload function.

**Question: Am I able to add multiple students for the same award but different amounts?**

 Answer**:** Yes, The amounts can differ in the same batch. Make the changes in the Disbursements section.

**Question: What's the MOST efficient way to enter an entire class of students, n=60+, who are all getting the same amount of a Departmental Award from the same chartstring?**

Answer: Enter one batch and add all 60 students.

**Question: Do all entries from this system get recorded in the General Ledger with program code 78?**

Answer: Yes, usually it is. Unless it is one of the few Item Types that was created that has Program code 40 (Instruction).

**Question: If the reviewer leaves a comment, will the award creator receive email notification?**

 Answer**:** Not from a comment being entered, no.

**Question: Can I assume that award year is like fiscal year, so "2017" = the 2016-17 year?**

 Answer**:** Award year refers to the “Aid Year” that Financial Aid uses. Currently we are in the 2016-2017 Financial Aid Year. That is referred to as the last date 2017. Not certain if Aid Year runs the exact same dates as the fiscal year.

**Question: For the description will it always say just "Department Award" or can we name it like we could in DSAS and it showed in MyFinAid. I would name it for example "Flight Reimbursement" and that is what the student saw.**

 Answer**:** Originally it was designed so that the name could be edited in the Apply Disbursements field. However that caused some problems and has temporarily been disabled to avoid issues.

**Charge Priority**

**Question: What Charge Priority do you use for training grant stipend or fee payments?**

Answer**:**  If you are looking to pay your student a stipend, you would use F\_REFUND/Stipend.

**Why is the word “Refund” used in the Charge Priority list? It should say STIPENDS and not reimbursements. This is regulated by the IRS and will cause confusion.**

 Answer**:** We have passed on concerns about the wording usage of “refund” - that may be renamed in the future. However the word Refund is not being used in the sense of a “reimbursement”. Refundability refers to whether an amount may be disbursed to the student. Selecting F\_REFUND, indicates that the full amount should disburse to the student, regardless of any outstanding charges on their account.

**Question: What charge priority should I use if I am submitting travel grant awards or prize awards?**

Answer**:** You will choose the charge priority based on how you want it to pay. If it is a travel grant you would choose the refund/stipend charge priority.

**Question: Why doesn't it ask whether the payment should be applied to CARS bills, like DSAS did? How do we indicate that information?**

Answer**:** The charge priority indicates what this will be applied to. For example selecting F\_Pay ALL\_N applies the money to ALL charges on the bill, including outstanding balance. Choosing F\_Refund/Stipend would NOT pay anything on the bill, the money would go directly to the student.

**Chartstrings**

**Question: Will we be entering awards based off item types that are then connected to the chartstring that we would have otherwise entered, or do we still enter chartstrings?**

Answer**:** You will now be using Item Types. For Department Awards, you will use the chartstring (in the Advance Search page) to find the associated Item Type.

**Question: For the chartstring, if our fund is a contract and grants, will the PCBU, Project and Activity number automatically populate?**

Answer: No.

**Question: Is there a place to enter speedtypes rather than individual chartstring attributes?**

Answer: No.

**Question: Is there a way to see the balance on the department and grad div accounts?**

 Answer**:**  We have referred this as a request for future enhancements, but this will likely be available via reports.

**Disbursements**

**NOTE: The first disbursement date is set for August 15th this year. So any scheduled 8/1 payments will be disburse on that date.**

**Question: Can we edit disbursement dates?**

Answer: No. Other than changing to a different Disbursement plan, you cannot change the dates.

**Question: When you have an academic year award that's for both semesters (fall/spring), do you enter the amount for the whole year, or do you enter the amount for each semester?**

Answer**:** Use the annual amount. The default is for a year, both semesters.

**Question: If we submit for Fall & Spring but in October, will the Fall payment pay right away?**

Answer**:** Yes, retroactive disbursements will disburse as soon as possible.

**Question: How do you get the payments to pay at the end of the month?**

Answer**:** Select ME (Monthly at End of Month)

**Question: If I wanted to pay a block grant stipend for the fall, could I simply select AY for disbursement plan and FS for split code, and then zero out the amount for spring so that the entire amount is disbursed for fall?**

Answer**:** Yes, but it would be better/easier to change the Split code to FL (Fall only)

**Question: Can total amount being awarded show on this page?**

 Answer**:** It’s on the list of requests for future enhancements, but we are not sure if it’s going to be added.

**Award types (summer awards, one-time awards)**

**Question: What is the award type for a stipend? Is it refund/stipend?**

Answer**:** Yes. F\_REFUND/STIPEND.

**Question: How do you do a fall only award?**

Answer**:** Use a Split code that only pays for one semester (e.g. FL or MF)

**Question: Why are reimbursements and stipends on the same line? Stipends are taxable income but reimbursements are not and fall under procurement.**

Answer**:** The word refund in this context does NOT refer to reimbursements. It means the money is “refundable”, meaning after paying whatever fees the charge priority is set to, all additional money is paid out to the student. If something is NOT refundable, any extra amount would NOT be given to the student. Refund/Stipend means the student gets the full amount you enter, nothing will be applied towards any fees or outstanding balance.

**Processing and approval**

**Question: If the Approver leaves the Department code blank when searching for awards to approve, will it just bring up items associated with your permissions/access?**

Answer**:** Originally there was an edit that required the Department code (aka Organizational Level 4) codes to be entered, but I believe that’s been removed. So the Approver should be able to leave that field blank to search.

**Question: How is the approver notified of an award needing to be approved? Do they receive an email or do they have to log into SIS to see a notification?**

Answer**:** They will receive an email. However, they can also log in as well.

NOTE: The email notifications are currently not working, but should be as of August 15th.

**Question: For department restricted Awards (funds held in Grad Division), depts. would complete a "form" downloaded from GLOW and email back to Grad Division to process -- is this manual process no longer necessary and the depts. would just enter directly into this award entry system for Grad Division-held funds?**

Answer**:** Correct. You can enter the awards directly yourself.

**Question: I am used to my CSS financial analyst approving stipend or training awards. Is this still possible or does it have to be grad division staff?**

Answer**:** For Departmental awards it will be someone in the department/CSS.

For a Graduate Award, the approver in the system has to be someone in the Graduate Division office. (If your departments feels the need to set up some sort of approval process that occurs before you do the entry, that is up to your department to institute).

**Adjusting awards after approval**

**Will there be some sort of pop up or notification when entering an award for a student that already has an award entered for the same semester?**

Answer**:** No. You would have to check the student’s Financial Aid summary.

**Question: Are we able to adjust an award once it's submitted and approved (for example to add another payment for the same semester to a pre-existing award)?**

Answer**:** You can make updates to an award entry batch up until it’s approved.

After that, yes, you can make edits, but that would be a revision, which is a slightly different process. There will be a job aid forthcoming on how to do this.

**Question: Once an award has been approved, can a preparer add new students to the batch award? Or just make edits to existing award details?**

Answer**:** No. Once approved, edits cannot be made to the entry. You would need to copy and revise the entry. To add a new student the best way would be to create a new batch. If you needed to adjust the Item Type or amounts for the already entered student, you would need to revise this entry. A job aid is being prepared for this.

**FERPA certification, training requirements, and system access**

**Question: What if I don’t have Financial Aid as an option under CAL Components**

Answer**:** You haven’t received access yet. Please contact sishelp@berkeley.edu for Access questions.

**Question: Are we required to attend an open lab?**

Answer: No. This is an optional follow up after you get access, if you want in-person help with entries.

**Question: When can we start to enter things? How soon can we start entering awards for Fall/Spring semester?**

Answer**:** As soon as you get access.

**Question: Do we have to use IE? Or will chrome or FireFox work as well.**

Answer**:** Any browser works.

**Question: Is it possible to increase the time-out time to more than 20 minutes?**

Answer**:** That would be a decision by the project system-wide. At this time there are no plans to increase it.

**Other**

**Question: How do I create a new Item Type?**

Answer: We will hold webinars and post videos online. There is a [Create New Financial Aid Type](http://sis.berkeley.edu/sites/default/files/creating_item_types_ja.pdf) job aid.

NOTE: The Create New Item Type function is currently broken. Until this is fixed, submit requests for new Item Types on this [Form](https://goo.gl/2Cj9PK) and an Item Type Number will be emailed back to you.

Please check [SIS Known Issues](http://sisproject.berkeley.edu/known-issues) page for updates to the fix.

**Question: What is the turnaround time for Billing & Payment Services to approve our new Item Types?**

Answer: We have not received a guaranteed turn-around commitment from Billing & Payment Service.

**Question: Can you show an example of tuition waivers?**

Answer**:** This is not being done in Award Entry, this will be done in the Student Financials module which is rolling out in a few months. Job aids and trainings will be available at that tie.

More Questions?

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**](https://berkeley.service-now.com/ess/create_incident)