

Revising Posted Award Entry

PATH: Cal Components > Financial Aid > Award Entry > Award Entry (to find the existing batch, then to edit the copy)

and

PATH: Cal Components > Financial Aid > Award Entry > Award Entry > Administer Batch Ext Award (to copy the original batch)

This job aid will cover how to revise a batch entry that has already been approved and posted. There are different cases where you will need to do this. The two most common changes will be: changing the amount a student receives, and/or changing the funding source. Next year, you may wish to copy a batch over from this Aid Year into the next Aid Year.

Examples of when you do not need to do a revision:

- If you need to edit a submitted batch <u>before</u> it is Approved and Posted. In this case, go back into the Award Entry batch and make the necessary edits.
- If you want to add a student who wasn't listed on the batch (that has already been Approved and Posted). In this case, add another Award Entry batch for that student.

In our example we will change the amount our students receive based on updated information, then since our funding source has changed, we also need to zero out the award on the first Item Type and add the information on a second Item Type.

Unless we already know the Batch Number or the Name (aka "Award Batch Package"), we may need to start with the Award Entry page and use the Find Existing Values tab to find the Award that has the information we are looking for. (See the Finding an Existing Award job aid.)

In this example, we have already found Batch #72 that contains the students' awards that need revising.



Copying an Award

Navigate to: Cal Components > Financial Aid > Award Entry > Award Entry> Administer Batch Ext Award

Enter the Batch Number, Select the Career, change the Status to Posted.

Entering the Org Level 4 (aka **Department**) is encouraged, but not required if you have the batch number.

Fin Aid Type may default depending on your access, make sure it reflects the correct choice of *Department Awards* or *Graduate Division Awards*.

Click Search.

The results should display below.

Click the checkbox to the left of the Batch Number.

Then go up and enter the Aid Year into the Copy to Aid Year field (use the same Aid Year if you are correcting it for this year).

Pick a new name to enter in the Copy to New Award Batch field (e.g. *Revised batch 72*)

Click the Copy icon.

Favorites 🔻 Main Menu 🔻 💽 > CAL Components 🔻 > Financial Aid 🔻 > Award Entry 🔻 > Av	dminister Batch Ext. Awards 🏫
Berkeley Menu - Search >> Advanced Sear	ch 🧕 Last Search Results
	New Window
Batch Number Institution UCB01 Q Aid Year 2017 Q Career	\checkmark
Fin Aid Type Department Awards V Org Level 4 Status Pending	
Award Batch Q Sea	arch
	È
	Delete
Personalize Find View All 🖄 👪 Batch Number Institution Aid Year Career Fin Aid Type Org Level 4 Award Batch	First (1) of 1 (1) Last Status
Image: Institution and real career Pill And real career Pill And real career Pill And real career Image: Im	Pending
	Pending

Batch Number	72 Q	Institution	UCB01	Aid Year	2017 🔍	Career	Graduate 🗸
Fin Aid Type	Department Awa	rds 🗸	Org Level 4		Q	Status	Posted 🗸
Award Batch			Q				Search

Batch Number 72 Q Institut Fin Aid Type Department Awards Award Batch Institut	rtion UCB01 C Aid Year 20	Olf Career Q Status Posted Search									
Copy To Aid Year 2017 Copy to Select All Deselect All											
	Personalize	: Find View All 🖾 🔣 💿 First 🕚 1 of 1 🕑 Last									
Batch Number Institution Aid Year	Career Fin Aid Type	Org Level 4 Award Batch Status									
✓ 1 72 UCB01 2017	Graduate Department Awards	COREC DEPT AWARD SPH 080516 Posted									

9/9/16



You'll get a message saying the copy has been successful.

Click OK to acknowledge this message.

Fin	Aid	umber Type Depa Batch	72 Q	Institu		B01 Q Drg Level 4		2017 Q	Career Status	Gradua Posted Sea		
Copy To Aid Year 2017 Copy to New Award Batch REVISE BATCH72 NEWFUNDNEWAMN Select All Deselect All Personalize Find View All 2 III Find												
	4	Batch Number				Fin Aid Ty		Org Level 4			000540	
I 72 UCB01 2017 Graduate Department Awards COREC DEPT AWARD S Message Successfully copied External Award Batches (26000,110) OK										ъРН 080516		

Now click back on the menu links above to go to the Award Entry page.

You do <u>not</u> have to Save, despite what the message says.

Click No to dismiss that message.

Favorites Main Menu CAL Compone	ents 🔻 > Financial Aid 🔻 > Award Entry 🕇 > Administer Batch Ext. Award:
Berkeley Menu - See	arch Award Entry
	Administer Batch Ext. Awards Department Security Tester Career Proceeding Org Level 4 Career Proceeding Search Career Proceeding Search Career Proceeding Ca
Select All Deselect All	
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Batch Number Institution Aid Year Career	Fin Aid Type Org Level 4 Award Batch Status
☑ 1 72 UCB01 2017 Graduate	Department Awards COREC DEPT AWARD SPH 080516 Posted
Save Warning Do you want to save Yes	ye your changes? Click Yes to go back and save, or No to discard your changes.

Editing the Copied Award



Back on the Award Entry page, you'll need to search on the Find an Existing Value tab page.

Search the values of Academic Career, Financial Aid Type and **Organizational Level 4** (Department code).

You can also include the new "name" in the Award Batch Package field.

The results will display below.

In this example, we have a new Batch Number 83 that we will need to click on to make the appropriate edits.

	A	cademic Institution:	begins with	UCB01		
	Д	id Year:	begins with 🗸	2017	Q	
	A	cademic Career:	=	Graduate		\sim
	F	inancial Aid Type:	=	Department Awards		\checkmark
	C	organization Level 4:	=	COREC	Q	
	Д	ward Batch Package:	contains 🗸	REVISE BATCH72	Q	
	A	warding Package Stat	tus: 💷 🔽			$\mathbf{\sim}$
	C	reated By:	begins with 🗸			
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			_			
		Search Clear	Basic Search	Save Search Criteria		
Find an Existing Value	Add a New V	alue				
Search Criteria						
			_			
Academic Institution:	begins with		2			
Aid Year:	begins with	2017	2			
Academic Career:	=	Graduate	\checkmark			
Financial Aid Type:	=	Department Awards	\checkmark			
Organization Level 4:	= 🗸	COREC	2			

Q

V

Award Batch Package

REVISE BATCH72 NEWFUNDNEWAMNT Pending

nter any information you have and click Search. Leave fields blank for a list of all valu

Award Entry

Search Criteria

Find an Existing Value Add a New Value

We are now in the new Award Entry batch.

Notice that it references the original batch number in the upper right corner.

	ch Num												70		
			83			ent Awards				Revised F			72		
Inst	itution	UC B	erkeley		Aid Year	Federal A	Aid Year 20	16-2017		Career	Graduat	е			
Org	Level 4	SPH I	Divisional R	srch and O	Ontrs Award Ba	atch REVI	SE BATCH	172 NEW	FUND	NEWAMN	Г				
Stat	us	Pendir	ig C	Comments	Created E	Зу				08/19/16	4:04PM				
App	rover		Q			Pos	t								
	ect All	Deselec	All Dele	ete Ad	d										
	▼ 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 945100032470 Q Department Award School of Public Health Active 10000.00 Pay All - No TIV Permission									Fall and Spring	Fall Spring					
Sel	ect All	Deselec	All Dele	ete Ad	bb	s	itudent(s) S	earch							
S	tudent	s	Personaliz	e Find	View All 🗖	Firs	st 🕚 1-2	of 2 🛞	Last						
		Studen	t ID	Na	me			Award Summa	ry						
C		1		Ge	nnady Gradstu	dent									
C		2	10	Ga	llina Gradstuder	nt									
App	lv Disb	ursement	s Dele	ete All	Replace D	isbursements	s usina firs	t row val	ues						
	·	ursemer		Pe	rsonalize Find			First		1-2 of 2 🌘	Last	-			
Item Type Student Award Description Student ID Disburse Split Award ID Date Amount															
1	1 945100032470 Department Award Gradstudent						t AY	· Q F	sQ	10000.0	00 🗶	1		0.00	
2	945100	0032470	Department	Award	2996230	Galina Gradstuden	t		MB Q	10000.0	00 🥖				

Award Batch Package:

Created By: Created Datetime

Search Results /iew All

Batch

Number

Awarding Package Status

>:

Search Clear Basic Search 🖾 Save Search Criter

Batch Sequence Number Institution Year Career Aid Type Level 4

UCB01 2017 Graduate DSAS COREC

begins with

REVISE BATCH72

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First 1 of 1 D La

Created By Created Dateti

3030729326 08/19/2016 4:0

Awarding

Package

Status

Awards Section:

We are ready to add the new funding source from which this payment is coming. We do <u>NOT</u> want to delete the previous Item Type. That would retain the original \$10,000 payment and would then grant an ADDITIONAL \$10,000 on the new funding sources if we simply added a new Item Type.

Therefore, our first step will be to add the second Item Type, then make sure we change the amount on the original Item Type to zero.

Warning: There is currently a bug, if you zero out the amount on the original Item Type, and then add the second Item Type, the amount will return and you will have to zero it out again.

Sele	t A	All Deselect All De	elete Ad	d									
-	Av	vards						F	Personalize I	Find Vi	ew All 💷 🔢	First 🕚	1 of 1 🛞 Last
		Item Type	Advance Search	Description		Additional Info	Status	A	mount		Charge Priority	Disburse Plan	Split Code
	1	1 945100032470	Q	Department Award		School of Public Health	Active		10		Pay All - No TIV Permission	Fall and Spring	Fall Spring
		the Advance	Searc	h icon		All Deselect All Del Awards					Pers	onalize Find View	v All 🗷 🔣
0111						Item Type	Advance Search	Description	A	dditional Ir	nfo Status	Amount	Charge Priority
						1 945100032470	Q	Departmen		chool of P lealth	ublic Active	10000.00	Pay All - No TIV Permission
						2	l Q	Description	1		Active	0.00	
the	ne	epartment aw ew Item Type	using			vpe Search	Active						
		ge Priority ar nation.	nd char	tstring	Item I	Type begins with V							

If you are revising a Graduate Division award, use the Keyword 3 or Short Descr fields, along with Charge Priority to search for the new Item Type.

In this case we have found the second Item Type with the updated chartstring information.

We've selected that Item Type by clicking the radio button and will click the Return button to carry that to the previous page.

Item Type Search					
ItemType Status	Active 🔽				
Item Type begins with 🗸					
Item From >= 🗸					
ltem To					
Description begins with					
Short Desc begins with V					
Short Desc (s					
Key Word 1					
Key Word 2	Q				
Key Word 3	Q				
Charge Priority	F_ALL_N				
Refundable Indicator	~				
	Enrollment Required?				
	Summer Award?				
Account	Q				
Fund Code	81786				
Department	14015	Crea	te New Item		
-					
Chartfield 1	Search		Return		
Chartfield 2	Q Search		Return		
Select an Item Type and then	choose Return				
				Personalize Find View	
Item Type Descri	iption		Additional Inf	fo	Charge Priority
1 945100017170 Depar	tment Award		School of Pu	blic Health	F_ALL_N

We now have two Item Types and we must decide how much of the Awards should come from each of these funding sources.

- A	wards			Person	Personalize Find View All 🖾 🔜 First 🕚 1-2 of 2				
	Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
	1 945100032470	Q	Department Award	School of Public Health	Active		1 CHHI33IOH	Fall and Spring	Fall Spring
	2 945100017170	Q	Department Award	School of Public Health	Active	0.00	Pay All - No TIV Permission	Fall and Spring	Fall Spring

In this example, we'd like the full amount for each student to come from the 2nd Item Type (on the different chartstring), so we will enter \$10,000 Award amount on the second Item Type.

NOTE: You could also move only part of the money, for example leaving half on the 1st Item Type and half on the 2nd one.

Aw	vards			Person	alize Find Viev	w Ali 💷 🔜	First 🕚 1-2 of 2 🕑 Last		
	Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
] 1	945100032470	Q	Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission	Fall and Spring	Fall Spring
] 2	945100017170	Q	Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission	Fall and Spring	Fall Spring

To ensure we back out the 1st payment, we must zero out the information on the original Item Type. Change the amount to zero.

Reminder: Do <u>NOT</u> delete the 1st Item Type. We need to signal that funds disbursed from this source should be backed out.

As soon as we make the change, a message displays, warning us that changing the Amount will affect the Award Amounts. Click the OK button to proceed with the change.

Students section:

We could add another student to this batch, if appropriate. In this example we do not need to make any edits to the **Students** section, so we will not make any changes.

Batch Nu	umbe	r 83		Department Award	s	Revised	From Batch Nbr	72				
Institutio	on	UC Berkeley	Messag	e								
Org Leve	el 4	SPH Divisional										
Status		Pending	Ohereitee	Changing Amount will update Award Amounts for this award. (26000,104)								
Approve	er [C	Changing	Amounts for this awa	aru. (20000,104)							
Select Al	JI D	eselect All D		Choose OK to change the Amount and Award Amounts for this award in the Disbursement Grid. Choose Cancel to not change the Amount.								
▼ Aw	vards	;	Choose C	ancer to not change the A	mount.							
	ltem	Туре	OK	Cancel				ority				
1 945100032470			Q	Department Award	School of Public Health	Active	0 Pay All - Permissi					
2	945	100017170	Q	Department Award	School of Public Health	Active	10000.00 Pay All - Permissi					

Disbursements section:

Scroll down to the Disbursements section. Disbursement Plan & Split Codes were before you apply the new Item Type.

When ready, click the Apply Disbursements link to carryover the new information to these students.

App	oly Disbursemen	ts Delete All	Replace D	isbursements using	first row v	alues		
	Disburseme	nts Perso	onalize Find	d View All 🗖	📕 Fir	rst 🕚	1-2 of 2 🕑 I	Last
	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount	
1	945100032470	Department Award	04041047	Gennady Gradstudent	AY Q	FS Q	0.00	Ø
2	945100032470	Department Award	200200	Galina Gradstudent	MB Q	MB Q	0.00	Ø

Notice that we now have 2 lines per student. The original Award/ Item Type that now shows zero. And a second line that shows the new Award on the second Item Type.

IMPORTANT: Check the Disbursement Plan and Split Codes after clicking the **Apply Disbursements** link. Those values will reset to the default.

In this case, the Disbursement Plan and Split Code have redefaulted to AY (Academic Year) & FS (Fall/Spring). We must remember to change them back to what they were in the original batch, otherwise our changes may not go through (the system wouldn't see a matching Disbursement to zero out).

<u>Ap</u>	oly Disbursemen	ts Delete All	Replace D	isbursements using	first row v	alues					
	Disburseme	nts Perso	onalize Find	nalize Find View All 🗷 🌆 👘 First 🕚 1-4 of 4 🛞							
	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount				
1	945100032470	Department Award	Tankerse .	Gennady Gradstudent	AY Q	FS Q	0.00	<u>/</u>			
2	945100017170	Department Award	Tankerse C	Gennady Gradstudent	AY Q	FS Q	10000.00	<u>/</u>			
3	945100032470	Department Award	2002003	Galina Gradstudent	AY Q	FS Q	0.00	Ø			
4	945100017170	Department Award	00000	Galina Gradstudent	AY	FS Q	10000.00	Ø			

We need to reenter any changes to **Disburse Plan** and **Split Code** that were on the original batch.

For example, we previously Galina on a Monthly (Beginning of Month) Disbursement Plan (MB) with a Spring/Fall Split Code (MB).

We need to change her original award on the first Item Type to be MB – MB. (If we want the new Item Type to also disburse monthly, we would also change the second line as well.) In this example, we'll leave the new Award to pay out as AY - FS (Academic Year – Fall & Spring).

We will now click the red pencil to verify how Galina's award is set up. She is now set up to get two disbursements, once each semester on the new Item Type.

Any amount disbursed on the old Item Type will be reversed out.

3 945100032470	Department Award	201203	Galina Gradstudent	MB	Q	MB	٩ [0.00	<u>/</u>
4 945100017170	Department Award	200403000	Galina Gradstudent	AY	Q	FS	Q	10000.00	<u>/</u>

Арр	ly Disbursement	ts Delete All	Replace D	isbursements using	g first row v	alues					artment Awa na Gradstude		
	Disburseme	nts Perso	onalize Fine	d View All 🗖	📑 Fi	rst 🕚	1-4 of 4	Last		Jaii	na Gradstudi	ent	
	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount			ID	Date	Amount	
1	945100032470	Department Award	enemit?	Gennady Gradstudent	AY	FS Q	0.00	Ľ			08/15/2016		000.00
2	945100017070	Department Award	concerns?	Gennady Gradstudent	AY	FSQ	10000.00	1	-	02	0110012011		
3	945100032470	Department Award	000000	Galina Gradstudent	MB	MB Q	0.00	<u>/</u>					
4	945100017070	Department Award	3100230	Galina Gradstudent	AY	FSQ	10000.00						

In this example, we also have an update to one of these student's Amounts. We'd like to change Gennady to receive \$4,000 (instead of \$10,000) and only for Fall. So we will need to change his Amount and the Split Code.

	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount	
1	945100032470	Department Award	(NORMAL)	Gennady Gradstudent	AY Q	FS Q	0.00	Ø
2	945100017070	Department Award	and the second	Gennady Gradstudent	AY Q	FS Q	10000.00	Ø



Click the Split Code Lookup icon to see the choices allowed when the Disbursement Plan is set to AY.

We see choices for Fall only, Fall & Spring or Spring only.

Click the FL choice to select Fall only.

We now want to update the amount Gennady receives.

We will change the \$10,000 amount to \$4000.

٩pp	ly Disbursemen			isbursements using			Disbursement Pla Split Code:	n: A begins with
	Disburseme	nts Pers Student Award Description	Student ID	d View All 🗖	Disburse Plan	rst ④ 1 Split Code	Description:	begins with
1	945100032470	Department Award	2000000T	Gennady Gradstudent	AY	FSQ	Look Up	Clear Cancel
2	945100017070	Department Award	100007	Gennady Gradstudent	AY	FS Q	Search Results	
3	945100032470	Department Award	20402330	Galina Gradstudent	MB	MBQ	View 100 First Split Code	1-3 of 3 Las Description
4	945100017070	Department Award	2941233	Galina Gradstudent	AY	FSQ	FL FS	Fall Fall Spring
							SP	Spring

	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount
1	945100032470	Department Award	0.000007	Gennady Gradstudent	AY Q	FS Q	0.00 🖉
2	945100017070	Department Award	(ALCORE)	Gennady Gradstudent	AY	FL Q	4000.00

Next we'll click the red pencil to verify that Gennady will now get one disbursement of \$4,000.

Based on the zeroed out line above, any previous disbursements will be reversed (backed out).

٩p	ply Disbursement	ts Delete All	Replace D	isbursements using	first row v	alues			artment Awa nady Gradst	
	Disburseme	nts Perso	nalize Find	d View All 🗖	😽 Fi	rst 🕚	1-4 of 4 🕑 Last	V	inady orado	uuun
	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount	ID	Date	Amount
1	945100032470	Department Award	1000041	Gennady Gradstudent	AY Q	FS Q	0.00 🥖		08/15/2016	4000.00
2	2 945100017070	Department Award	property.	Gennady Gradstudent	AY Q	FL Q	4000.00		2.1.2.5/2.011	0.00

We have made all the changes needed to this revised batch.

Scroll up to look up the **Approver** field. Use the **Lookup icon** to select the appropriate person.

A message displays letting us know the Approver has received an email notification that there is a batch to review.

Batcl	h Nu	imber 83		Department A	Awards	Revised From Batch Nbr 7	2
nstit	utio	n UC Berkeley		Aid Year F	ederal Ai	d Year 2016-2017 Career Graduate	
Org L	.eve	4 SPH Divisional R	srch and C	Ontrs Award Batch	REVIS	E BATCH72 NEWFUNDNEWAMNT	
Statu	IS	Pending C	Comments	Created By	-	Look Up Approver	×
Appr	rover				Post	Empl ID: begins with	
			ete Ad	d	_	Look Up Clear Cancel Basic Lookup	
		Item Type	Advance Search	Description		Search Results	
	1	945100032470	Q	Department Award		View 100 First 🕚 1-3 of 3 🕑 Last	
						Empl ID Display Name	
	2	945100017070	Q	Department Award		30 M E	

Message	
Successfully r	notified the approver (26000,115)
OK	



Scroll down and click the Save button at the bottom of the page.

-	Disburseme	nts Perso	onalize Find	d View All 💷	😽 Fi	rst 🕚	1-4 of 4 🕑	Last
	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount	
1	945100017070	Department Award	(ALCORN)	Gennady Gradstudent	AY	FL Q	4000.00	Ø
2	945100032470	Department Award	2000007	Gennady Gradstudent	AY	FSQ	0.00	Ø
3	945100032470	Department Award	100000	Galina Gradstudent	MB	MBQ	0.00	Ø
4	945100017070	Department Award	2010/02/0	Galina Gradstudent	AY	FSQ	10000.00	ļ
	ave 🔯 Reti	urn to Search	evious in List	J Next in Lis	st			

NOTE: Until the "zero" bug can be fixed, the Approver may see the original amount display again in Award section (the zero keeps being replaced by the original amount). However, the revision <u>will</u> go through correctly since the Amount in the Disbursements section <u>will</u> continue to show the zero Amount.

Support

For questions or assistance, please contact SIS Support.:

Call 510-664-9000 (press option 6 to reach SIS support) or Email: sishelp@berkeley.edu