

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 before 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.

	Batch Number	Institution	Aid Year	Career	Fin Aid Type	Org Level 4	Award Batch	Status
<input checked="" type="checkbox"/>	1	72 UCB01	2017	Graduate	Department Awards	COREC	DEPT AWARD SPH 080516	Posted

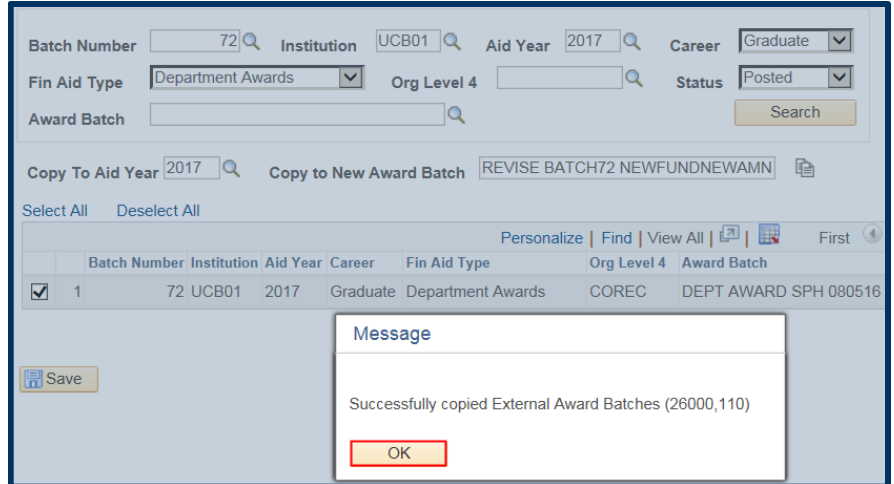
Then go up and enter the Aid Year into the **Copy to Aid Year** field (use the same Aid Year if you are correcting it for this year).

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

Click the **Copy** icon.

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

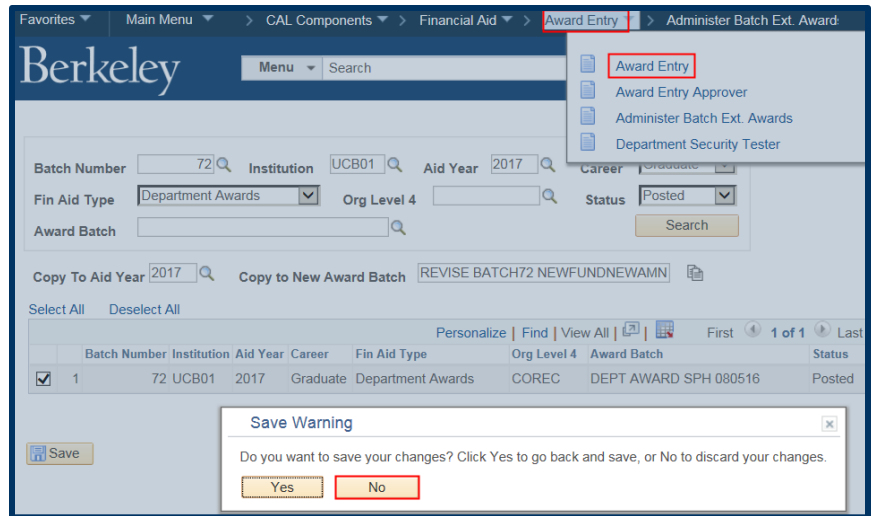
Click **OK** to acknowledge this message.



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

You do not have to **Save**, despite what the message says.

Click **No** to dismiss that message.



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.

Batch Sequence Number	Academic Institution	Aid Year	Academic Career	Financial Aid Type	Organization Level 4	Award Batch Package	Awaiting Package Status	Created By	Created Datetime
83	UCB01	2017	Graduate	DSAS	COREC	REVISE BATCH72 NEWFUNDNEWAMNT	Pending	3030729326	08/19/2016 4:04PM

We are now in the new Award Entry batch.

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

Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
1	945100032470	Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission	Fall and Spring	Fall Spring

Student ID	Name	Award Summary
1	Gennady Gradstudent	
2	Galina Gradstudent	

Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1	945100032470 Department Award	Gennady Gradstudent	AY	FS	10000.00
2	945100032470 Department Award	Galina Gradstudent	MB	MB	10000.00

Awards Section:

We are ready to add the new funding source from which this payment is coming. We do **NOT** 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.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
1 945100032470		Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission	Fall and Spring	Fall Spring	<input type="checkbox"/>

Click the **Advance Search** icon on the new line.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
1 945100032470		Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission	Fall and Spring	Fall Spring	<input type="checkbox"/>
2		Description		Active	0.00				<input type="checkbox"/>

For Department awards, look up the new Item Type using **Charge Priority** and chartstring information.

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

Item Type Status: Active

Item Type: begins with

Item From: >=

Item To: <=

Description: begins with

Short Desc: begins with

Key Word 1:

Key Word 2:

Key Word 3:

Charge Priority: F_ALL_N

Refundable Indicator: Enrollment Required? Summer Award?

Account:

Fund Code: 81786

Department: 14015

Chartfield 1:

Chartfield 2:

Buttons: Create New Item, Search, Return

Select an Item Type and then choose Return

Item Type	Description	Additional Info	Charge Priority
<input checked="" type="radio"/> 1 945100017170	Department Award	School of Public 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.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
<input type="checkbox"/> 1 945100032470		Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission	Fall and Spring	Fall Spring	
<input type="checkbox"/> 2 945100017170		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.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
<input type="checkbox"/> 1 945100032470		Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission	Fall and Spring	Fall Spring	
<input type="checkbox"/> 2 945100017170		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 **NOT** delete the 1st Item Type. We need to signal that funds disbursed from this source should be backed out.

Batch Number 83 Department Awards Revised From Batch Nbr 72

Institution UC Berkeley
Org Level 4 SPH Divisional
Status Pending
Approver

Select All Deselect All

Message

Changing Amount will update Award Amounts for this award. (26000,104)

Choose OK to change the Amount and Award Amounts for this award in the Disbursement Grid.
Choose Cancel to not change the Amount.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
<input type="checkbox"/> 1 945100032470		Department Award	School of Public Health	Active	0	Pay All - No TIV Permission			
<input type="checkbox"/> 2 945100017170		Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission			

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.

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.

Apply Disbursements		Delete All		Replace Disbursements using first row values		
Disbursements		Personalize Find View All [Print] [Grid]		First 1-2 of 2 Last		
Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount	
1 945100032470	Department Award	[Redacted]	Gennady Gradstudent	AY	FS	0.00
2 945100032470	Department Award	[Redacted]	Galina Gradstudent	MB	MB	0.00

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.

Apply Disbursements		Delete All		Replace Disbursements using first row values		
Disbursements		Personalize Find View All [Print] [Grid]		First 1-4 of 4 Last		
Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount	
1 945100032470	Department Award	[Redacted]	Gennady Gradstudent	AY	FS	0.00
2 945100017170	Department Award	[Redacted]	Gennady Gradstudent	AY	FS	10000.00
3 945100032470	Department Award	[Redacted]	Galina Gradstudent	AY	FS	0.00
4 945100017170	Department Award	[Redacted]	Galina Gradstudent	AY	FS	10000.00

In this case, the Disbursement Plan and Split Code have re-defaulted 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).

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

3	945100032470	Department Award	Galina Gradstudent	MB	MB	0.00
4	945100017170	Department Award	Galina Gradstudent	AY	FS	10000.00

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.

Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount	
1	945100032470	Department Award	Gennady Gradstudent	AY	FS	0.00
2	945100017070	Department Award	Gennady Gradstudent	AY	FS	10000.00
3	945100032470	Department Award	Galina Gradstudent	MB	MB	0.00
4	945100017070	Department Award	Galina Gradstudent	AY	FS	10000.00

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

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	Gennady Gradstudent	AY	FS	0.00
2	945100017070	Department Award	Gennady Gradstudent	AY	FS	10000.00

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.

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).

The screenshot shows a table with columns: Item Type, Student Award Description, Student ID, Disburse Plan, and Split Code. A search popup is open for the Split Code field, showing results for 'FL' (Fall), 'FS' (Fall Spring), and 'SP' (Spring). The 'FL' option is highlighted with a red box.

Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1 945100032470	Department Award	Gennady Gradstudent	AY	FS	0.00
2 945100017070	Department Award	Gennady Gradstudent	AY	FL	4000.00

The screenshot shows the Disbursements table with two rows. The second row, for item 2, shows a disbursement of 4000.00 with a red pencil icon next to the amount field. A popup window shows a list of disbursements for Gennady Gradstudent, with the 4000.00 amount highlighted in red.

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.

The screenshot shows the Awards table with columns: Item Type, Advance Search, and Description. A lookup popup is open for the Approver field, showing a search results table with columns: Empl ID and Display Name. The 'Mina Lee' entry is highlighted with a red box.

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

The screenshot shows a message dialog box with the text: "Successfully notified the approver (26000,115)". There is an "OK" button at the bottom.

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

Disbursements							Personalize	Find	View All	First	1-4 of 4	Last
Item	Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount					
1	945100017070	Department Award	[REDACTED]	Gennady Gradstudent	AY	FL	4000.00					
2	945100032470	Department Award	[REDACTED]	Gennady Gradstudent	AY	FS	0.00					
3	945100032470	Department Award	[REDACTED]	Galina Gradstudent	MB	MB	0.00					
4	945100017070	Department Award	[REDACTED]	Galina Gradstudent	AY	FS	10000.00					

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 will go through correctly since the Amount in the Disbursements section will 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