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.

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.

We are now in the new Award Entry batch.

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

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

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

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.

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.

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.

![Image of the Disbursements section]

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 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.

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.

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.
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).

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

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