

Revising Posted Award Entry

PATH: Main Menu > CAL Components > Financial Aid > Award Entry > Award Entry

This job aid will cover the process of revising a batch entry that has already been approved and posted by making a copy of the entry and then updating the copy. There are many revisions you can make to an award, but the two most common revisions are: *changing the amount a student receives and/or changing the funding source.*

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.
- If you are using a new Item Type for a new award and do not need to make any adjustments to previous awards.

If you do not know which Award batch needs to be edited, remember that you can use the **Search Awards for Student** page to look up which batches they are on.

You may wish to use the **Administer Batch Ext Award** function to copy a batch in this Aid Year or copy into the next Aid Year. See the Copy an Award Batch job aid.

In this example, we are making 2 changes. First, we are changing the funding source based on updated information. Since our funding source has changed, we also need to *zero out* the award on the first Item Type and add the information via a second Item Type. Second, there is a change to one of the student's amount. In this example, we have found out that he is receiving other awards for Spring, so we need to reduce the amount we have previously submitted.

We could start a new batch and type in all the original information with the modifications we need, but in this example, we have already copied the original award and are ready to edit it with our changes.

Editing a Copied Award

The Award Entry page will default to the **Find an Existing Value** tab.

We will search for the copy.

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

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

Click **Search**.

The results display below.

In this example, we have a new Batch Number 83.

Click anywhere in the line to open that batch.

We are now in the new Award Entry batch.

Notice that it references the original batch number in the upper right corner ("Revised From Batch Nbr 72").

This is one benefit of copying the original batch, rather than creating a new entry.

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

Update the Awards Section

In this example, we would like to move some funds to another chartstring. We will need a new Item Type.

We do NOT want to delete the previous Item Type. If we simply add the new Item Type and delete the old one, we would retain the original \$10,000 payment and would then grant an ADDITIONAL payment on the new chartstring.

Instead, we will add the second Item Type, then make sure we change the amount on the original Item Type to zero, *zeroing out* the original Item Type award. This signals that those funds should be reversed.

Click **Add**.

Note: If you are changing the amount the student receives, you should NOT add a new line - just change the amount.

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

WARNING: There is currently a bug in the system: if you zero out the amount on the original Item Type *before* adding the second Item Type, the amount will return when you add the second Item Type. Best practice is to add the second Item Type first, then zero out the first Item Type.

If the number reverts again, it is ok to leave it there, the amount in this top section will not trigger an award – AS LONG AS the details in the Disbursements section below are set to zero for that Item Type.

Click the **Advance Search** icon on the new line to search for the new **Charge Priority**.

Awards		Personalize	Find	View All	Print	
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority
<input type="checkbox"/> 1 945100032470		Department Award	School of Public Health	Active	10000.00	Pay All - No TIV Permission
<input type="checkbox"/> 2		Description		Active	0.00	

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**.

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

Item Type Search

ItemType Status:

Item Type:

Item From:

Item To:

Description:

Short Desc:

Key Word 1:

Key Word 2:

Key Word 3:

Charge Priority:

Refundable Indicator:

Enrollment Required?
 Summer Award?

Account:

Fund Code:

Department:

Chartfield 1:

Chartfield 2:

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

Click the radio button to select the Item Type.

Then click **Return** to carry that Item Type to the previous page.

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

Awards		Personalize	Find	View All	Print	First	1-2 of 2	Last
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 would like the full amount for each student to come from the second Item Type (on the different **chartstring**), so we will enter \$10,000 in the Amount on the second Item Type.

Reminder: Deleting the first Item Type, rather than reversing it, will cause the original award to be remain as we as adding the new award (which is not what we want in this case). Do **NOT** delete the first Item Type. We need to signal that funds disbursed from this source should be backed out. To back out of the original award on the first Item Type we need to *zero out* the first Item Type by typing 0.

NOTE: In other cases you may only want to move part of the money. For example, you might update the amount to \$6,000 on the first Item Type and move the other \$4,000 to the second Item Type.

WARNING: If you are revising this job aid in order to add a Spring award on the same Item Type (having previously entered a Fall only award (AY_FL)), you must restate the fall amount and add the amount for Spring. If you submit a revised award with only the Spring information (AY_SP Disbursement/Split codes), the system would assume that ONLY Spring should disburse and would revoke the Fall only payment. We'll talk more about the Disbursement & Split codes below in the Disbursements section.

In this example, we are only moving the funding so we have added the 10,000 onto the 2nd Item Type and changed the amount on the original Item Type to zero.

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	0.00	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	

As soon as we make a change, a message displays, warning us that changing the Amount will affect the Award Amounts.

Click **OK** to acknowledge the message.

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.

Item Type	Description	Additional Info	Status	Amount	Charge Priority
<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

Update the Students Section

We could add or delete students in this batch, if appropriate. If your change only affects 1 student in a batch with multiple other students, it IS ok to delete the other students. Deleting them will NOT reverse any previous changes.

In this example, we do not need to make any edits to the **Students** section, so we will not make any changes.

Update the Disbursements Section

Scroll down to the **Disbursements** section.

Warning: Make sure to take note of what the **Disburse Plan & Split Codes** were before you apply the new Item Type. When you click **Apply Disbursements**, these codes will default to **AY/FS** for academic year (or the summer defaults for a summer award).

When ready, click the **Apply Disbursements** link to carryover the new information (from the Awards section) to these students.

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

Apply Disbursements		Delete All		Replace Disbursements using first row values	
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 945100032470	Department Award	Gennady Gradstudent	AY	FS	0.00
2 945100017170	Department Award	Gennady Gradstudent	AY	FS	10000.00
3 945100032470	Department Award	Galina Gradstudent	AY	FS	0.00
4 945100017170	Department Award	Galina Gradstudent	AY	FS	10000.00

IMPORTANT: Check the Disbursement Plan and Split Codes after clicking the **Apply Disbursements** link. Those values will have reset to the default (AY/FS) for academic year awards (SM or S1 for summer awards).

In this case, the Disbursement Plan and Split Code have re-defaulted to AY (Academic Year). We must remember to change them back to what they were in the original batch, otherwise our changes may not go through (e.g. in this case, the system wouldn't see a matching "AY" Disbursement to zero out).

The only time we should change the Split code is if we submitted a FALL ONLY payment (a Split code of FL or MF) on an Item Type and then want to add an amount for Spring. In that case you *DO* want to change the Split code to cover BOTH Fall and Spring (FS or one of the monthly codes that covers both terms). If you add another award on this Item Type and use a Spring ONLY payment, the system would assume you did NOT want the Fall payment, and it would be reversed. The system considers the entire academic year when determining disbursements.

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

For example, we previously had 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).

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

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.

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

In this example, we also have an update one of these student's Amounts. Based on new information that he will be getting other awards/funding in the Spring, we'd like to change Gennady to receive \$4,000 (instead of \$10,000) and for Fall only.

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.

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

We now want to update the amount Gennady receives.

We will change the \$10,000 amount to \$4,000.

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

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

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

Based on the new amount entered on the new Item Type, Gennady will only now only receive \$4,000.

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

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.

Batch Number 83 Department Awards Revised From Batch Nbr 72
 Institution UC Berkeley Aid Year Federal Aid Year 2016-2017 Career Graduate
 Org Level 4 SPH Divisional Rsrch and Cntrs Award Batch REVISE BATCH72 NEWFUNDNEWAMNT
 Status Pending Comments Created By
 Approver [lookup icon]

Look Up Approver
 Empl ID: begins with [input]
 Look Up Clear Cancel Basic Lookup

Search Results
 View 100 First 1-3 of 3 Last

Empl ID	Display Name
30	M...
30	E...

Select All Deselect All Delete Add

▼ Awards

Item Type	Advance Search	Description
1 945100032470	[lookup icon]	Department Award
2 945100017070	[lookup icon]	Department Award

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

Message

Successfully notified the approver (26000,115)

OK

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	Gennady Gradstudent	AY	FL	4000.00
2 945100032470	Department Award	Gennady Gradstudent	AY	FS	0.00
3 945100032470	Department Award	Galina Gradstudent	MB	MB	0.00
4 945100017070	Department Award	Galina Gradstudent	AY	FS	10000.00

Save Return to Search Previous in List Next in List

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)
 Email: sishelp@berkeley.edu