

## 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. We'll edit a copy of the entry.

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, or need to review previous entries, 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 **Copy Award Entry Batch** function to copy a batch in this Aid Year or copy into the next Aid Year. See the **Copy an Award Batch** job aid for more information.

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 an 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

Navigate to the Award Entry page and search for the copied award on 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 **Status** and/or the new name in the **Award Batch Name** field.

Click **Search**.

The screenshot shows a search criteria form with the following fields and values:

- Batch Number: [Empty]
- Academic Institution: begins with UCB01
- Aid Year: begins with 2018
- Academic Career: Graduate
- Financial Aid Type: Department Awards
- Organization Level 4: eheec
- Award Batch Name: begins with Revised
- Award Batch Status: Pending
- Created By: [Empty]
- Created Datetime: >= [Empty]

Buttons at the bottom: Search (highlighted with a red box), Clear, Basic Search, Save Search Criteria.

The results display below.

In this example, our copy Batch Number 16348.

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 15613*").

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

## Update the Awards Section

**Moving Funds:** In this example, we will move some funds to another chartstring. We will need to find or create another 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, to reverse the original Item Type award. This signals that those funds should be reversed.

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

We have changed the Amount on the first line to zero.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
1 945100096320		Departmental Award	EECS Department Fellowship Stipen 57415-49175-11533-78- -	Active	0.00	F_REFUND	AY	FS	
2 945100096330		Departmental Award	EECS Department Fellowship Tuitio 57425-49175-11533-78- -	Active	10085.50	F_TUIMAN	AY	FS	

Now we are ready to add the new Item Type we want those funds to come from instead.

Click **Add**.

Then click the **Advance Search** icon on the new line to search for the Item Type that is linked to our new chartstring and the Charge Priority of Refund.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
<input type="checkbox"/> 1 945100096320		Departmental Award	EECS Department Fellowship Stipen 57415-49175-11533-78- -	Active	0.00	F_REFUND	AY	FS	
<input type="checkbox"/> 2 945100096330		Departmental Award	EECS Department Fellowship Tuitio 57425-49175-11533-78- -	Active	10085.50	F_TUIMAN	AY	FS	
<input type="checkbox"/> 3		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 **Short Descr** fields, along with **Charge Priority**.

Since we want to move the stipend to another chartstring, we'll search for a Charge Priority of **F\_Refund** and the new chartstring.

In this case, we have searched and found an Item Type that matches.

Click the radio button to select the Item Type.

Then click **Return** to carry that Item Type 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\_REFUND

Refundable Indicator:  Enrollment Required?  Summer Award?

Account:

Fund Code: 50996

Department (number): 11533

Program Code: 78 Student Financial Aid

Chartfield 1:

Chartfield 2:

Select an Item Type and then choose Return

Item Type	Description	Additional Info	Charge Priority	Account	Fund Code	Department	Program Code
<input checked="" type="radio"/> 1 945100063910	Departmental Award	Department Award	F_REFUND	57415	50996	11533	78

We now have 3 Item Types and we'll decide how much of the Awards should come from each of these.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
1 945100096320		Departmental Award	EECS Department Fellowship Stipen 57415-49175-11533-78- -	Active	0.00	F_REFUND	AY	FS	
2 945100096330		Departmental Award	EECS Department Fellowship Tuitio 57425-49175-11533-78- -	Active	10085.50	F_TUIMAN	AY	FS	
3 945100063910		Departmental Award	Department Award 57415-50996-11533-78-3DCSTU-	Active	38664.50	F_REFUND	AY	FS	

In this example, we would like the full amount of the stipend for each student to come from the new Item Type (on the different **chartstring**), so have entered \$38,664.50 in the Amount on the third Item Type.

**Reminder:** Deleting the first Item Type, rather than reversing it, will cause the original award to remain, and we'd be adding an additional 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.

### Changing Amounts:

The second change we want to make is to increase the tuition payment. We would like to add an additional \$1,000 (Note: if this was a change that affected just one student in an award batch with multiple students, then we would make the change only on that student's distribution line below.) If this change affects all students, or there is only one student in the batch, change the **Amount** in the **Awards** section.

In this example, since we're adding an additional \$1,000, we will update the amount to \$11,085.50. Reminder, if we had typed in 1,000, the system would assume we wanted to backout the other \$9,085.50 that has previously been disbursed.

Awards									
Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code	
1 945100096320		Departmental Award	EECS Department Fellowship Stipen 57415-49175-11533-78- -	Active	0.00	F_REFUND	AY	FS	
2 945100096330		Departmental Award	EECS Department Fellowship Tuitio 57425-49175-11533-78- -	Active	11085.50	F_TUIMAN	AY	FS	
3 945100063910		Departmental Award	Department Award 57415-50996-11533-78-3DCSTU-	Active	38664.50	F_REFUND	AY	FS	

**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. Instead, all the full years amount with AY\_FS (or the equivalent monthly code). We'll talk more about the Disbursement & Split codes below in the **Disbursements** section.

You can also check the **"Existing Amount"** column in the disbursements section below to confirm what was previously paid on this Item Type.

After changes to the **Award** section, a message displays, warning us that changing the Amount will affect the Award Amounts.

Click **OK** to acknowledge the message.

Item Type	Advance Search	Message	Charge Priority
945100096320	<input type="text"/>	Changing Amount will update Award Amounts for this award. (26000,104)	F_REFUND
945100096330	<input type="text"/>	Choose OK to change the Amount and Award Amounts for this award in the Disbursement Grid. Choose Cancel to not change the Amount.	F_TUIMAN
945100063910	<input type="text"/>	<input type="button" value="OK"/> <input type="button" value="Cancel"/>	F_REFUND

## 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. Review what is showing.

Check the **Existing Amount** column.

The newly updated Amounts display, but the rest of the information is from the previous batch.

Make sure to take note of what the **Disburse Plan & Split Codes** are 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). However, we need to make sure we submit this revision on the same **Disburse Plan & Split code**.

Apply Disbursements		Delete All	Copy Disbursements from					Personalize	Find	<input type="text"/>	<input type="text"/>	First	1-2 of 2
Disbursements													
Existing Amount	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount						
38664.50	945100096320	Departmental Award		Giovanni Gradstudent	AY	FS	0.00						
10085.50	945100096330	Departmental Award		Giovanni Gradstudent	AE	AE	11085.50						

When ready, click the **Apply Disbursements** link to carry over the new information to the student(s).

Apply Disbursements		Delete All	Copy Disbursements from					Personalize	Find	<input type="text"/>	<input type="text"/>	First	1-3 of 3	Last
Disbursements														
Existing Amount	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount							
38664.50	945100096320	Departmental Award		Giovanni Gradstudent	AY	FS	0.00							
10085.50	945100096330	Departmental Award		Giovanni Gradstudent	AY	FS	11085.50							
	945100063910	Departmental Award		Giovanni Gradstudent	AY	FS	38664.50							

Let's examine each line now and determine what changes may be needed.

**Note:** The **Item Types** have resorted themselves based on the #, so they may be in a different order from when you added them in the Awards section.

**IMPORTANT:** Remember to check and reenter the original **Disburse Plan** and **Split Code** 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) and **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 (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.

Our first line shows the "existing amount" that was previously entered on this Item Type. We have changed the Amount to Zero. The same default Disburse Plan & Split Code were also previously used. There are no further changes to make on this line. This will correctly reverse the previous disbursement.

Apply Disbursements		Delete All		Copy Disbursements from						
Disbursements						Personalize	Find	First	1-3 of 3	Last
Existing Amount	Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount				
38664.50	945100096320	Departmental Award	[REDACTED]	AY	FS	0.00				
10085.50	945100096330	Departmental Award	[REDACTED]	AY	FS	11085.50				
	945100063910	Departmental Award	[REDACTED]	AY	FS	38664.50				

On the second line, we see the original amount Disbursed in the Existing Amount column, and our new **Amount** on the right. We could make further changes to the Amount (for example, this was one of many students and only this student had a change to the amount).

The original batch had **Disburse Plan** and **Split Code** of **AE**, so we need to change that to match.

Apply Disbursements		Delete All		Copy Disbursements from						
Disbursements						Personalize	Find	First	1-3 of 3	Last
Existing Amount	Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount				
38664.50	945100096320	Departmental Award	[REDACTED]	AY	FS	0.00				
10085.50	945100096330	Departmental Award	[REDACTED]	AY	FS	11085.50				
	945100063910	Departmental Award	[REDACTED]	AY	FS	38664.50				

We have reentered the original **Disburse Plan** and the **Split Code**. We have also clicked the **red pencil** icon to review the disbursement dates and amounts. Dates cannot be changed, but the disbursement amounts can be adjusted, so long as they add up to the total amount. (e.g. a Fall payment of \$5,000 and the remaining amount in Spring).

Existing Amount	Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
38664.50	945100096320	Departmental Award	[REDACTED]	AY	FS	0.00
10085.50	945100096330	Departmental Award	[REDACTED]	AE	AE	11085.50
	945100063910	Departmental Award	[REDACTED]	AY	FS	38664.50

The third line is the new Item Type. No previous disbursements to this student have occurred on this Item Type, so the **Existing Amount** is blank. We could change the **Disburse Plan** and **Split Code** to a monthly code (**MB** or **ME**). However, in this case, we will leave it as **AY & FS**. We have also clicked the **red pencil** to see the disbursement dates and amounts.

Note: If there were multiple students on this batch and we had made a change on this Item Type that we wanted copied to all the other students on this Item Type, we could click the **Copy Disbursement from** link.

Existing Amount	Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
38664.50	945100096320	Departmental Award	[REDACTED]	AY	FS	0.00
10085.50	945100096330	Departmental Award	[REDACTED]	AE	AE	11085.50
	945100063910	Departmental Award	[REDACTED]	AY	FS	38664.50

### Adding the Approver & Save

When satisfied, scroll up to the top of the page.

Optional: Click the **Comments** link to leave comments.

Use the **lookup icon** to select the appropriate **Approver**.

Finally, scroll down and click the **Save** button at the bottom of the page

Batch Number	16348	Department Awards	Revised From Batch
Institution	UC Berkeley	Aid Year	Federal Aid Year 2017-2018
Org Level 4	Elec Engr & Computer Sc	Award Batch	REVISED MUPPETS FELLOWSHIP
Status	Pending	Created By	[REDACTED]
Approver	[REDACTED]		08/24/17 4:58PM

Existing Amount	Item Type	Student Award Description
38664.50	945100096320	Departmental Award
10085.50	945100096330	Departmental Award
	945100063910	Departmental 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

If you have any questions about Revisions, please email: [awardentry@berkeley.edu](mailto:awardentry@berkeley.edu)

