

Approving Departmental Awards

Path: CAL Components > Financial Aid > Award Entry > Approve Batch Entry

One approver is assigned to a Departmental Award batch entry. This departmental approver reviews and approves or rejects award entries to authorize disbursements of departmental awards to students.

Note: Users with both roles (the ability to both enter and approve awards) will not be allowed to approve a batch they entered.

Approvers are notified via email when there are awards to review.

NOTE: Approvers will not be able to Approve an award batch if there is a new Item Type still waiting for approval.

Before beginning, ensure that you have set your system defaults. This is an annual set up, which speeds up entry by defaulting fields like [Institution](#) and [Aid Year](#). For more information refer to [SetUp SACR Defaults for Financial Aid](#).

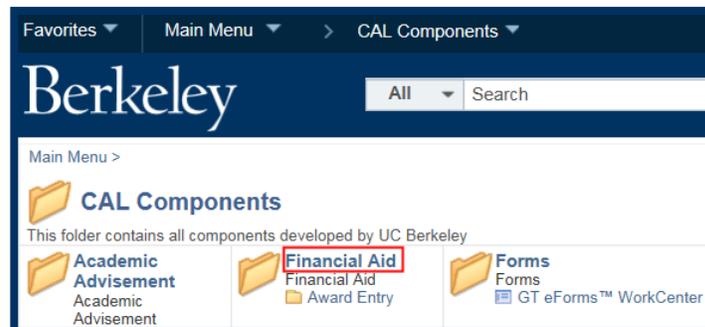
In this example, we will review and decide whether to approve or reject an award batch.

After logging into [Campus Solutions](#), navigate using either the top menu or the right hand navigation icon.

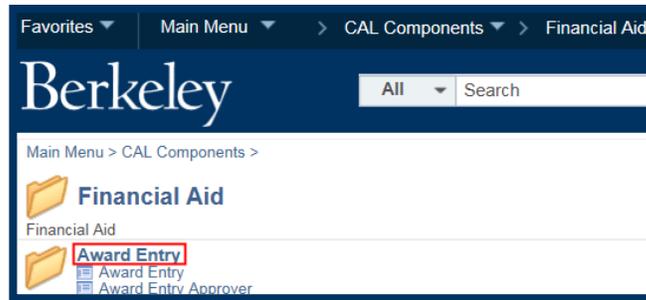
Click on CAL Components.



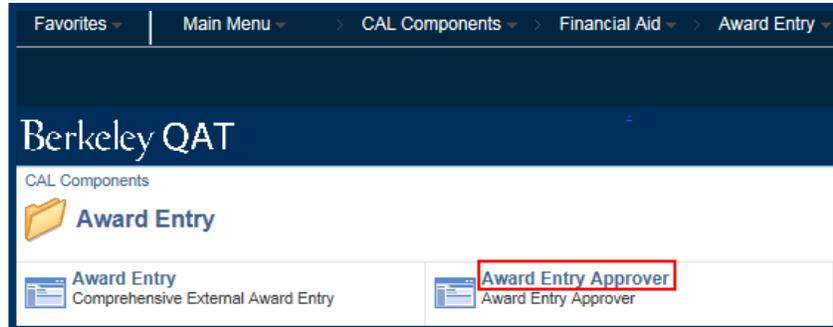
Click the [Financial Aid](#) link in the CAL Components folder.



Click the Award Entry folder link.



Then click the Award Entry Approver link.



The search page displays.

If you have set system defaults, the Institution and the Aid Year may default. Fin Aid Type will default to Department Awards.

Batch Number	<input type="text"/>	Institution	UCB01	Aid Year	2018	Career	<input type="text"/>
Fin Aid Type	Department Awards	Org Level 4	<input type="text"/>	Status	Pending	<input type="button" value="Search"/>	
Award Batch	<input type="text"/>						

Aid Year, Career, Fin Aid Type, and Org Level 4 (Department) are required values.

Batch Number	<input type="text"/>	Institution	UCB01	Aid Year	2018	Career	Graduate
Fin Aid Type	Department Awards	Org Level 4	EHEEC	Status	Pending	<input type="button" value="Search"/>	
Award Batch	<input type="text"/>						

If you know the Batch Number, enter that as well, to go directly to that batch.

In this example, we have filled out the required fields, but will leave the Batch Number blank, and search for all award batches pending our approval.

Click the Search button.

Depending on how broad or narrow your search, there may be many results, only one or even none.

In this example, our search has returned 2 results. We'll click on Batch Number 14684 to review that batch.

Batch Number Institution Aid Year Career

Fin Aid Type Org Level 4 Status

Award Batch

Personalize | Find | View All | First 1-2 of 2

Batch Number	Institution	Aid Year	Career	Fin Aid Type	Org Level 4	Award Batch
1 14684	UCB01	2018	Graduate	Department Awards	EHEEC	TESTING
2 14687	UCB01	2018	Graduate	Department Awards	EHEEC	TEST REJECT

We are now in the Award Entry batch that our colleague entered.

Batch Number 14684 Department Awards

Institution UC Berkeley Aid Year Federal Aid Year 2017-2018 Career Graduate

Org Level 4 Elec Engr & Computer Sc Award Batch TESTING

Status Pending Comments Created By 08/09/17 4:59PM

Approver

Select All Deselect All Delete Add

Awards Personalize | Find | View All | 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 945100095200	<input type="text"/>	Departmental Award	EECS Department Fellows 57415-51526-11543-78-3DCSTU-EHFEL	Active	1000.00	F_REFUND	AY	FS
<input type="checkbox"/> 2 945100097790	<input type="text"/>	Departmental Award	57415-37250-25337-78- -	Active	24550.00	F_TUIMAN	AY	FS

Select All Deselect All Delete Add Student(s) Search

Students Personalize | Find | View All | First 1-2 of 2 Last

Student ID	Name	Award Summary
<input type="checkbox"/> 1	Greg Gradstudent	<input type="text"/>
<input type="checkbox"/> 2	Gracie Gradstudent	<input type="text"/>

Apply Disbursements Delete All Copy Disbursements from

Disbursements Personalize | Find | View All | First 1-4 of 4 Last

Existing Amount	Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1	945100095200	Departmental Award	Greg Gradstudent	ME	ME	1000.00
2	945100097790	Departmental Award	Greg Gradstudent	AY	FS	500.00
3	945100095200	Departmental Award	Gracie Gradstudent	ME	ME	1000.00
4	945100097790	Departmental Award	Gracie Gradstudent	AY	FS	24550.00

ID	Date	Amount
1		

The first thing to check, is whether the Awarder left any comments.

Click the [Comments](#) link in the top section.

Batch Number	14684	Department Awards		
Institution	UC Berkeley	Aid Year	Federal Aid Year 2017-2018	Career Graduate
Org Level 4	Elec Engr & Computer Sc	Award Batch	TESTING	
Status	Pending	Comments	Created By	08/09/17 4:59PM
Approver	<input type="text"/>	<input type="text"/>	<input type="button" value="Post"/>	

The Comments and History appears.

In this example, we can see a comment, as well as see a history of the edits made to this batch. When we have finished reviewing the comments, click the [OK](#) button to return to the previous Award Entry batch page.

Award Entry Comments and History

Comments

Funding from chartstrings confirmed.
Greg gets less \$ for tuition, because already receiving funds through other Dept Awards.

Ext. Award Modification History

Date/Time	Name	Action
1 08/09/17 4:59:19.000000PM	S...	Batch awards Created
2 08/10/17 11:45:39.000000AM	Student Financials Batch	Item approved
3 08/11/17 4:30:23.000000PM	S...	Batch award modified

Review the Award(s)

Our first review should be the [Awards](#) section.

Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
1 945100095200	<input type="text"/>	Departmental Award	EECS Department Fellows 57415-51526-11543-78-3DCSTU-EHFEL	Active	1000.00	F_REFUND	AY	FS
2 945100097790	<input type="text"/>	Departmental Award	57415-37250-25337-78- -	Active	24550.00	F_TUIMAN	AY	FS

Review the Awards listed. Check the funding source (chartstring) and amount. Check the [Charge Priority](#) for each Award. A Charge Priority indicates what charges incurred by the student will be paid for by this award and how the funds will disburse (to the bill or to the student). For more information and definitions, please see the [Charge Priority job aid](#).

In this example, we have verified these are correct. We want to pay a \$1,000 Stipend to each of the students and \$24,550 towards Tuition & Mandatory fees.

We will examine the [Disbursement plans](#) and [Split codes](#) in more detail below when we look at the Disbursement details.

Review the Student(s)

Check that the correct students have been entered.

Optional: You have the ability to view a student's billing summary and financial aid summary.

	Student ID	Name	Award Summary
<input type="checkbox"/>	1	Greg Gradstudent	
<input type="checkbox"/>	2	Gracie Gradstudent	

To see a student's bill (Customer Accounts) click their name.

Note: If you have "View As" ability in *CalCentral*, you can see this information there too.

The [Customer Accounts](#) page opens in a new browser window.

Click [Account Details](#) to see more information such as specific fees and amounts.

Account Type	Account Number	Term	Balance	Currency Code	Open Date	Status	
ALLFEES	0000001001	2017 Fall	9,315.75	USD	07/26/2017	Active	Account Details
ALLFEES	0000001001	2017 Summer	0.00		05/15/2017	Active	Account Details
ALLFEES	0000001001	2017 Spring	0.00		11/30/2016	Active	Account Details
ALLFEES	0000001001	2016 Fall	0.00		07/31/2016	Active	Account Details

The [Account Details](#) page will show a breakdown of the fees. You may need to click the [View All](#) link to see all charges and payments. For more information see the [View Customer Accounts](#) job aid.

Item	Term	Class	Taxes	Amount Incl Tax	Balance	Installment ID	Last Activity Date	
Berkeley Campus Fee	2017 Fall			693.75	693.75		07/26/2017	Item Details
Class Pass Fee - Transit	2017 Fall			76.00	76.00		07/26/2017	Item Details
Graduate Resident Tuition	2017 Fall			5,751.00	5,751.00		07/26/2017	Item Details

Close the second browser window to return to the Award Entry page.

To view a summary of a student's Financial Aid awards, click the **Award Summary** grid icon.

	Student ID	Name	Award Summary
<input type="checkbox"/>	1	Greg Gradstudent	
<input type="checkbox"/>	2	Gracie Gradstudent	

The **Award Summary** opens in a new window.

This view is for the entire year. You can click the **Award Term Summary** tab to see a breakdown by semester.

Item Type	Description	Career	Offered	Accepted	Authorized	Disbursed
944100004270	Block Grant Award-EECS	GRAD	113.00	113.00	0.00	0.00
944300005210	Department Award-EECS	GRAD	15,102.00	15,102.00	0.00	0.00
944300005220	Department Award-EECS	GRAD	18,631.50	18,631.50	0.00	0.00
TOTAL			33,846.50	33,846.50	0.00	0.00

In this example, this student has a Block Grant and other Department Awards, so we want to ensure this extra payment will not cause an over-award.

After reviewing the Financial Award Summary pages, close the second browser window to return to the Award Entry batch.

Review the Disbursements

Back on the Award Entry page, we're ready to review the third section, Disbursements. We will check each line to review each award for each student to ensure the correct amounts are being disbursed on the correct schedule. We will also doublecheck whether previous payments have been processed for the student on an Item Type (which is a specific combination of funding source and Charge Priority).

Previously we have reviewed the funding source, amount, student's need and other factors. Now we are focusing on how and when these funds will disburse (via the **Disbursement Plan** and the **Split Code**).

Disbursement Plans control when and how often an award will disburse. The most common choices are a single payment per semester (e.g. **AY** in Fall and/or Spring or **SM** and **S1** in Summer) or a Monthly disbursement (e.g. **MB** = beginning of each month in Fall/Spring, for 5-10 months or **SU** = Monthly, beginning of month in summer).

Split Codes are conditional, depending on the Disbursement plan and they designate if the award will be for Fall only (e.g. **FL** or **MF**), Spring only (e.g. **SP** or **MS**), Fall & Spring (e.g. **FS**, **MB**, **MR**, **ME**, etc.) or Summer (**SM**, **S1**).

Another consideration is whether we have already given money on a particular Item Type during the same Academic Year (which counts both Fall and Spring) or during the Summer. If so, an amount will show in the **Existing Amount** field.

Disbursements		
	Existing Amount	Item Type
1	5224.00	945100097200

Example: If we saw that a student has already received an amount on an Item Type (the combination of charstring & charge priority), this batch would be considered a “revision” of a previous award. If a student already received \$5,224.00 and we submitted another award for \$1,000, on the same Item Type (same chartstring, same Charge Priority) for the same Academic Year, the new amount supercedes the original.

-If we submit a \$1,000 award on this Item Type, the original \$5224.00 would be reversed and the student would receive only \$1,000. (even if that original amount was coded as Fall only (Split code **FL**) and we submitted a Spring only (Split code **SP**) award, because they system considers Fall & Spring, so it would think the Fall only payment was no longer valid and that we were instructing it to **ONLY** pay the student in Spring.

-If we wish to add an *additional* thousand dollars, then we would submit an award for \$6,224.

To research a student’s previous batch, we could search the student to see their previous batches. See the [Search Student’s Awards](#) job aid for more information.

In our example, none of the columns have an amount in the **Existing Amount** column, so we do not need to worry about this being a revised award.

Click the red pencil  next to each line to review the specific disbursement dates and amounts.

Disbursements			Personalize Find  		First	1-4 of 4	Last
Existing Amount	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount
1	945100095200	Departmental Award		Greg Gradstudent	ME	ME	1000.00 
2	945100097790	Departmental Award		Greg Gradstudent	AY	FS	500.00 
3	945100095200	Departmental Award		Gracie Gradstudent	ME	ME	1000.00 
4	945100097790	Departmental Award		Gracie Gradstudent	AY	FS	24550.00 

Note: The **Amount** in the **Disbursements** section can vary from what is in the **Award** section.

We have clicked to view the 1st award.

In this example, the Disbursement Plan of ME (Monthly, end of month) was chosen and the corresponding Split Code of ME (Monthly for Fall & Spring) .

There are 10 monthly payments now showing.

Check the amounts to ensure they are correct. In this case the award amount is \$1,000 and we have 10 monthly payments of \$100.

Date of each disbursement:

Dates are NOT editable.

If a date is in the past, the system disburse as soon as possible after approval.

Amount: of each disbursement:

Amounts default to split evenly. (e.g. 1,000 divided by 10 is \$100 each month.)

However manual edits can be made (e.g. pay \$50 one month, \$150 the next.)

A month can even be left blank (as long as they add up to the total amount). E.g., August could be blank but September could disburse \$200.

Disbursements								Personalize Find [?] []			First	1-4 of 4	Last																																
Existing Amount	Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount	Departmental Award Greg Gradstudent																																					
	945100095200	Departmental Award	[REDACTED]	Greg Gradstudent	ME	ME	1000.00	<table border="1"> <thead> <tr> <th>ID</th> <th>Date</th> <th>Amount</th> </tr> </thead> <tbody> <tr><td>1 01</td><td>08/25/2017</td><td>100.00</td></tr> <tr><td>2 02</td><td>09/25/2017</td><td>100.00</td></tr> <tr><td>3 03</td><td>10/25/2017</td><td>100.00</td></tr> <tr><td>4 04</td><td>11/21/2017</td><td>100.00</td></tr> <tr><td>5 05</td><td>12/20/2017</td><td>100.00</td></tr> <tr><td>6 06</td><td>01/25/2018</td><td>100.00</td></tr> <tr><td>7 07</td><td>02/23/2018</td><td>100.00</td></tr> <tr><td>8 08</td><td>03/25/2018</td><td>100.00</td></tr> <tr><td>9 09</td><td>04/25/2018</td><td>100.00</td></tr> <tr><td>10 10</td><td>05/25/2018</td><td>100.00</td></tr> </tbody> </table>					ID	Date	Amount	1 01	08/25/2017	100.00	2 02	09/25/2017	100.00	3 03	10/25/2017	100.00	4 04	11/21/2017	100.00	5 05	12/20/2017	100.00	6 06	01/25/2018	100.00	7 07	02/23/2018	100.00	8 08	03/25/2018	100.00	9 09	04/25/2018	100.00	10 10	05/25/2018	100.00
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Departmental Award Greg Gradstudent			
ID	Date	Amount	
1 01	08/25/2017	100.00	
2 02	09/25/2017	100.00	
3 03	10/25/2017	100.00	
4 04	11/21/2017	100.00	
5 05	12/20/2017	100.00	
6 06	01/25/2018	100.00	
7 07	02/23/2018	100.00	
8 08	03/25/2018	100.00	
9 09	04/25/2018	100.00	
10 10	05/25/2018	100.00	

Click the red pencil next to the second line.

Because the Disbursement Plan is AY (Academic Year), it's a standard fall/spring disbursement that will pay once per term.

Because the Split Code is FS (Fall&Spring), this will pay in both Fall and Spring.

Note: The Amounts in the Disbursements section can vary from what was entered in the Award section. (e.g. Gary receives \$500 instead of \$24,500)

Dates of disbursements show. In this case the 1st payment will be Aug 14th, (or the closest day after if this is retroactive) and the 2nd will occur Jan 8th.

Amount: Disbursements are usually split evenly. However in this case a manual change was made.

Item Type	Student Award Description	Student ID		Disburse Plan	Split Code	Award Amount		Greg Gradstudent									
945100095200	Departmental Award	[redacted]	Greg Gradstudent	ME	ME	1000.00	[pencil]										
945100097790	Departmental Award	[redacted]	Greg Gradstudent	AY	FS	500.00	[pencil]	<table border="1"> <thead> <tr> <th>ID</th> <th>Date</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>1 01</td> <td>08/14/2017</td> <td>300.00</td> </tr> <tr> <td>2 02</td> <td>01/08/2018</td> <td>200.00</td> </tr> </tbody> </table>	ID	Date	Amount	1 01	08/14/2017	300.00	2 02	01/08/2018	200.00
ID	Date	Amount															
1 01	08/14/2017	300.00															
2 02	01/08/2018	200.00															
945100095200	Departmental Award	[redacted]	Gracie Gradstudent	ME	ME	1000.00	[pencil]										
945100097790	Departmental Award	[redacted]	Gracie Gradstudent	AY	FS	24550.00	[pencil]										

Greg Gradstudent			
ID	Date	Amount	
1 01	08/14/2017	300.00	
2 02	01/08/2018	200.00	

In this case there are no issues with this payment, so we will click the next red pencils to inspect the 3rd and 4th lines as well.

Approvers cannot edit the information. It is also not possible to approve just part of a batch, so if we found that Greg's awards were ok, but Gracie's awards were not, we could not Approve the batch.

Rejecting a batch closes it for updates, so if there are errors, contact the Awarder and have them make corrections, then come back and approve the batch once it is correct.

Approving an Award Batch

Once we have determined that awards are coming from the correct funding source, for the correct amounts, that they are appropriate for these students and that the disbursements are set up correctly, then we are ready to approve a batch.

However, if errors had been found: We have a choice to suspend our review and ask the Awarder to fix these errors or to **Reject** this batch. If we reject this batch, the Awarder will not be able to edit the batch and would need to copy and revise the batch or create an entirely new batch. So this is not recommended.

Scroll up to the top of the page.

Optional: To leave comments, click the [Comments](#) link.

In the **Status** drop-down, change the status from *Pending* to *Approve*.

The **Status** will change to *Approve* and a pop-up message will confirm it's ready to be posted and remind us to click the **Post** button.

Click the **OK** button to acknowledge the message.

Batch Number 79 Department Awards
 Institution UC Berkeley Aid Year Federal Aid Year 2016-2017 Career Graduate
 Org Level 4 SPH Divisional Rsrch and Cntrs Award Batch SPH DEPTAWARD JULY16 XX
 Status **Approve** Pending Reject Comments Created By 07/13/16 6:25PM
 Approver Post

Batch Number 79 Department Awards
 Institution UC Berkeley Aid Year Federal Aid Year 2016-2017 Career Graduate
 Org Level 4 SPH Divisional Rsrch and Cntrs Award Batch SPH DEPTAWARD JULY16 XX
 Status Approve Comments Created By 07/13/16 6:25PM
 Approver Post

Select All Deselect All Delete

▼ Awards

Item Type	Amount	Charge Priority
1 945100032470 Department Award School of Public Health Active 10000.00 Pay All - No TIV Permission		
2 945100039290 Department Award School of Public Health Active 7551.00 Non-Resident Fees Only		

Since the awards are correct, we will click the **Post** button.

NOTE: If there are questions about an award batch, do not click **Post**. Once **Posted**, it's harder to make changes.

For changes after Posting, a revision would be needed. See the [Revising a Posted Award Batch](#) job aid for more information.

The system will process this request.

The **Status** changes to *Posted*.

The word "Saved" will flash in the upper right corner for a few seconds, and a message will popup confirming this has been posted to external awards tables.

Click **OK** to acknowledge the message.

Batch Number 79 Department Awards
 Institution UC Berkeley Aid Year Federal Aid Year 2016-2017 Career Graduate
 Org Level 4 SPH Divisional Rsrch and Cntrs Award Batch SPH DEPTAWARD JULY16 XX
 Status Approve Comments Created By 07/13/16 6:25PM
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 Org Level 4 SPH Divisional Rsrch and Cntrs Award Batch SPH DEPTAWARD JULY16 XX
 Status **Posted** Comments Created By 07/13/16 6:25PM
 Approver Post

Select All Deselect All Delete

▼ Awards

Item Type	Amount	Charge Priority
1 945100032470 Department Award School of Public Health Active 10000.00 Pay All - No TIV Permission		
2 945100039290 Department Award School of Public Health Active 7551.00 Non-Resident Fees Only		

The **Post** button has greyed out, and a **Posting Date** has appeared.

A record of the date, time and approver will show in the **Comments & History** section, if you click the **Comments** link.

Batch Number	79	Department Awards		
Institution	UC Berkeley	Aid Year	Federal Aid Year 2016-2017	Career Graduate
Org Level 4	SPH Divisional Rsrch and Cntrs	Award Batch	SPH DEPTAWARD JULY16 XX	
Status	Posted	Comments	Created By	07/13/16 6:25PM
Approver	30 [redacted]	[redacted]	Post	Posted 07/16/2016 External Award Nbr

We have successfully Approved and Posted these awards.

A process will run once a day to move the awards into the student's aid package and will soon display to the student on *CalCentral/My Finances* page.

Support:

For questions or assistance, please contact: awardentry@berkeley.edu