Campus Solutions Financial Award Processing:

Guidelines and Good Practice for PGR Students

Student Services Centre
The University of Manchester
email: funding@manchester.ac.uk
www.manchester.ac.uk/ssc
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Author: Patrick Ryan

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Introduction

In addition to Student Services staff, designated School/Faculty users have access to input financial awards to students via Campus Solutions. This document describes how you enter a basic financial award on Campus Solutions, it does NOT go into detail about more complex awards arrangements. For further information on more complex matters please contact the Student Funding Team in the SSC by phoning internal ext. 69902, or emailing funding@manchester.ac.uk.

Basic requirements before awards can be entered

1. Student must be term activated for the current academic year. Once academically term activated, the financial aid term activation runs automatically on a daily basis.
2. Finance code to be charged must be active in Oracle Financials, and item type setup in Campus Solutions

Finance codes

In advance of entering awards requests to activate any new Finance codes should be emailed to funding@manchester.ac.uk as soon as possible, using the appropriate template. If you do not have a copy of the template please email the Funding team to request a copy.

Please note Finance codes can only be setup on Campus Solutions 48 hours after they have been fully activated on Oracle Financials.

Schools also need to notify the Student Funding Team when finance codes are de-activated in Oracle Financials, as this will prevent any remaining awards from being processed.

September 2018 Registrants

New students

For new PG students commencing in September awards can be entered from 1st August, but only once the student is active in program (i.e. they are matriculated), and their financial aid record term activated.

Returning students

For returning PG students who are September 2018 registrants, do not manually term activate records, or enter any awards for the new academic year until 6th August 2018 at the earliest, as this will prevent any remaining instalment from the previous academic year, due for payment on 1st September, from being released.

Payment release dates

The first instalment of any PG award entered for September registrants will be processed on or after the start of Welcome Week, and only when a student has fully completed registration.

Please note, that although the first instalment may be released early, students need to be aware when setting up direct debits and standing orders that the actually due date for payment of their award is the 1st of each month, commencing 1st October.

Below is a table detailing the expected payment dates fort he 2018/19 academic year:

Payment due date		Proposed payment run date Tuesday	Proposed pay date Thursday	No. of days between payments
* 01 October 2018		25-Sep-18	27-Sep-18	
01-Nov-18		23-Oct-18	25-Oct-18	28
01-Dec-18		27-Nov-18	29-Nov-18	35
**01 January 2019		18-Dec-18	20-Dec-18	21
01-Feb-19		22-Jan-19	24-Jan-19	35
01-Mar-19		26-Feb-19	28-Feb-19	35
01-Apr-19		26-Mar-19	28-Mar-19	28
01-May-19		23-Apr-19	25-Apr-19	28
01-Jun-19		28-May-19	30-May-19	35
01-Jul-19		25-Jun-19	27-Jun-19	28
01-Aug-19		23-Jul-19	25-Jul-19	28
01-Sep-19		27-Aug-19	29-Aug-19	35

* 1 October instalment will be processed as early as 18 September and credited to students' bank accounts on 20 September, provided students have fully completed registration by 14 September.
** Due to Christmas shutdown it is necessary to process the 1 January award a week early.

Non September Registrants

New students

For new PG students commencing mid year (i.e. not the main registration period in September) awards can be entered on Campus Solutions once the student's record has been academically term activated, and their financial aid record term activated.

Returning students

For mid year returning PG students, do <u>not</u> manually term activate records, or enter any awards for the new academic year until the final instalment of awards for the existing aid year has been disbursed on Campus Solutions.

Under normal circumstance once you academically term activate a record for a non September registrant the first instalment of any award for the new academic year will only be released once they have fully completed registration.

However, for mid-year registrants to receive the first instalment of their maintenance stipend prior to completing registration for the new academic year, their academic record should not be rolled forward until after the first instalment of the award for the new academic year has already disbursed on Campus Solutions. <u>Please note processing awards in this manner should be the exception to the rule as Schools/Faculties are taking a risk in processing payments to students prior to them having fully registered for the new academic year, and perhaps in advance of their academic progression being confirmed.</u>

Student bank details

In order for us to process an award we require students to submit their UK bank account details online using the following instructions:

1.   Log into My Manchester
2.   Go to the 'Tools' menu and select 'Student System'
3.   Click 'Campus Finances' and then 'View Financial Aid' (this page shows your awards for the current academic year)
4.   Click the green 'Bank Details' button and enter and save your UK bank details. *If you have already entered and saved your bank details then the green button will not be visible.*

Further details on providing bank details can be found at:
http://www.studentsupport.manchester.ac.uk/finances/funding-opportunities/receiving-my-payments/university-bursaries-grants-and-stipends/

To amend bank details students must visit the Student Services Centre to complete a change of bank details form.

Entering an Award

To enter a payment on Campus Solutions you need to access the following screen:

Home / Financial Aid / Awards / Award Processing / Assign Awards to a Student

Enter Student ID and ensure Aid Year is populated (eg. 2019 is 2018/19 academic year, 2018 is 2017/18 etc.).

Should bring up the following screen. If the student record doesn't appear, this suggests student's record has not been term activated, and you should contact the Funding Team in the Student Services Centre.

Before you begin entering a new award ensure the career field is populated. If blank refer to the Funding Team.

To begin entering an award type 'B' in the action field. This is the only option that should be selected at this time. Other options available here, which should never be used, include:

- 'O' offers the award to students. Campus Solutions is a US system, and in the States students are offered the award and have to accept. This is functionality we do not use.
- 'X' discards an award, and is not appropriate for us to use at the initial assign award stage.

Next you need to search for the item type by clicking on the spyglass next to the item type field, which brings up the following screen.
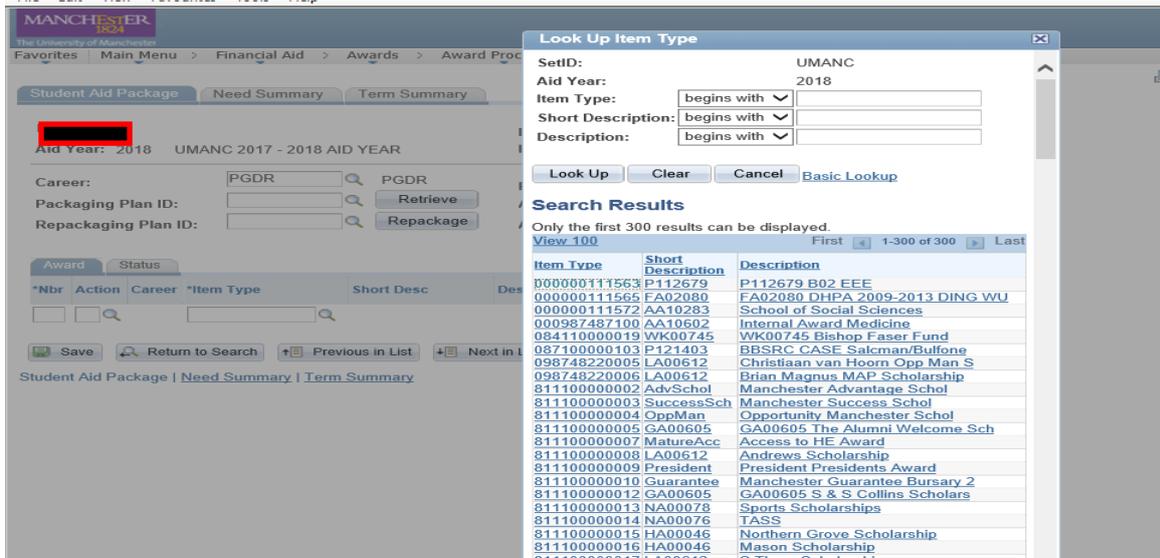
Enter the first part of the finance code you wish to use in the Short Description field e.g. YA00202 or R0123456. If the code appears in the search simply select, otherwise you will need to contact the Funding Team in the SSC to have the item type set up. If you know you will need to use a new Finance code to make an award to a student please email funding@manchester.ac.uk, as early as possible to get the code set up and avoid any possible delays (see page 12 of this document).
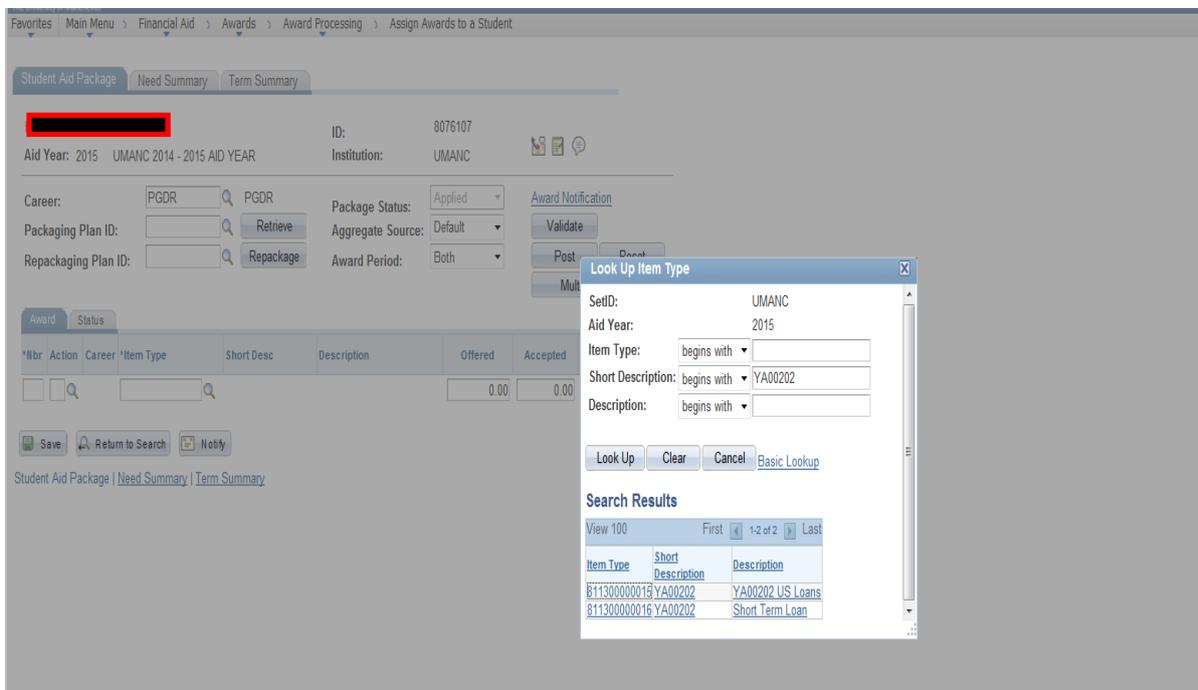
Once you have selected the item type you wish to use you are returned to the main assign awards page and the 'Item type', 'Short desc' and 'Description' fields will have been automatically populated.

Next enter the amount you want to pay in the offered box. **NB only enter the amount of the award that relates to the current academic year, ie. for the period October through to the following September.** If the award is spread over two academic years for example, if a student registers in January, the award should be posted for January – September in one Aid Year and October – December in the next Aid Year (See later notes about entering multi year awards).

Once an amount is entered in the offered field, tab to the accepted field which will then automatically populate. The disbursement plan and split code fields will also be populated automatically with a default value, which can be changed if required. For payments to PGR/PGT students the disbursement plan should always be 99.

The split code determines the instalments you wish the total award entered to be split over.

Click on the spyglass to select the split code you want to use.

This brings up all the split code options, which should be self explanatory
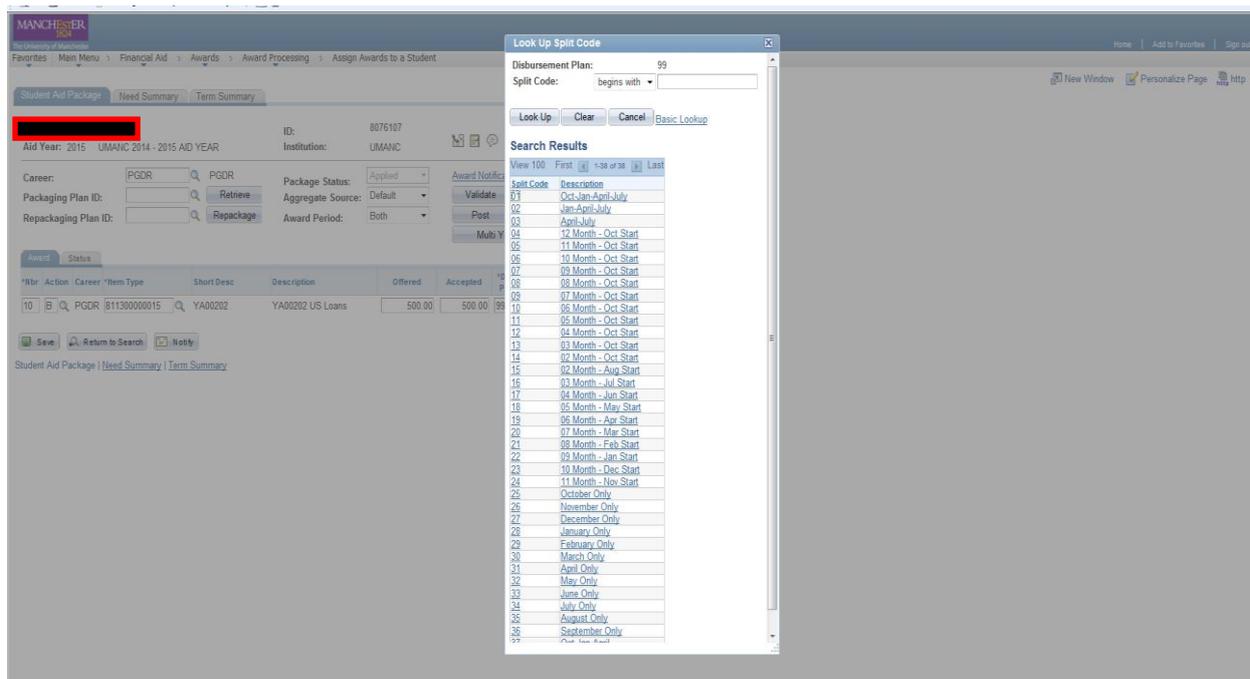
Simply select the split code you want to use, for example if you want to split the award to be paid over twelve equal monthly instalments commencing on 1st October select split code '04'. Once you select a split code you are again returned to the main assign awards screen.

Once you are happy with the information entered click on validate. It should come up with the following message.
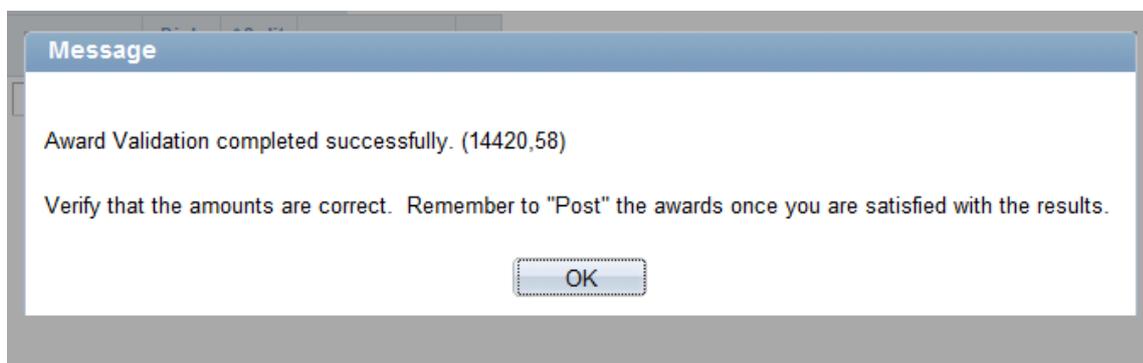

Assuming everything is ok once you validate, you can re-check the payment plan you have chosen by clicking on the disbursement link at the end of the award line.

Provided you are happy return to the assign awards screen and select post. That's it all done!

To enter another award for the same student from a different finance code simply click on the + at the end of the existing line and repeat the process.

Error Message

Occasionally the following error message can appear.
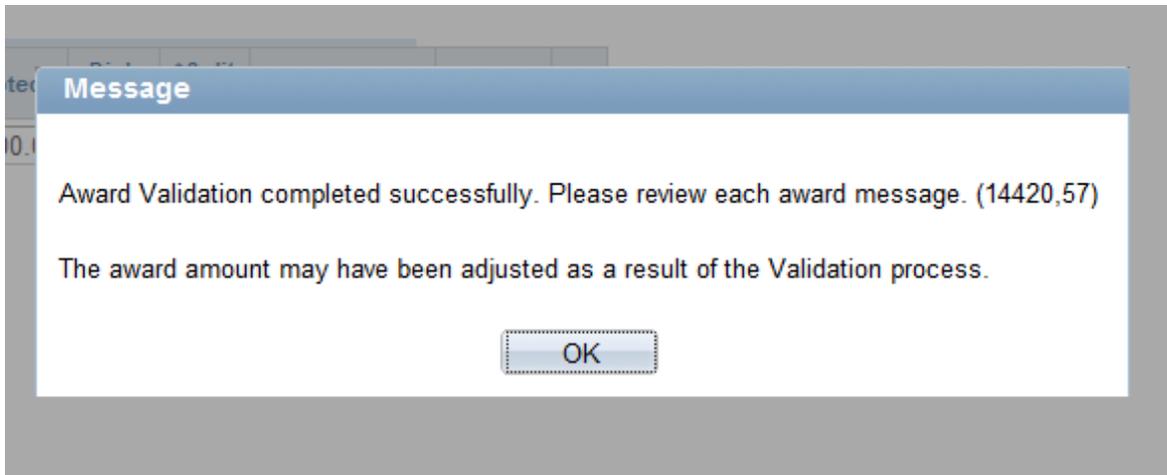
In these circumstances there is something wrong with the student's underlying record, or the set-up of the item type, and you will need to contact the Funding Team to get this resolved before re-entering the award.

Cancelling an award

PLEASE NOTE IF AMOUNTS HAVE BEEN DISBURSED YOU CANNOT SIMPLY CANCEL AN AWARD AS THIS WILL CREATE DUPLICATE PAYMENTS IN ERROR.

If you have made a mistake or want to cancel an award BEFORE any instalments have been disbursed you simply enter 'C' in the action box on the assign awards screen, the amounts should revert to zero, and then you simply validate and post.
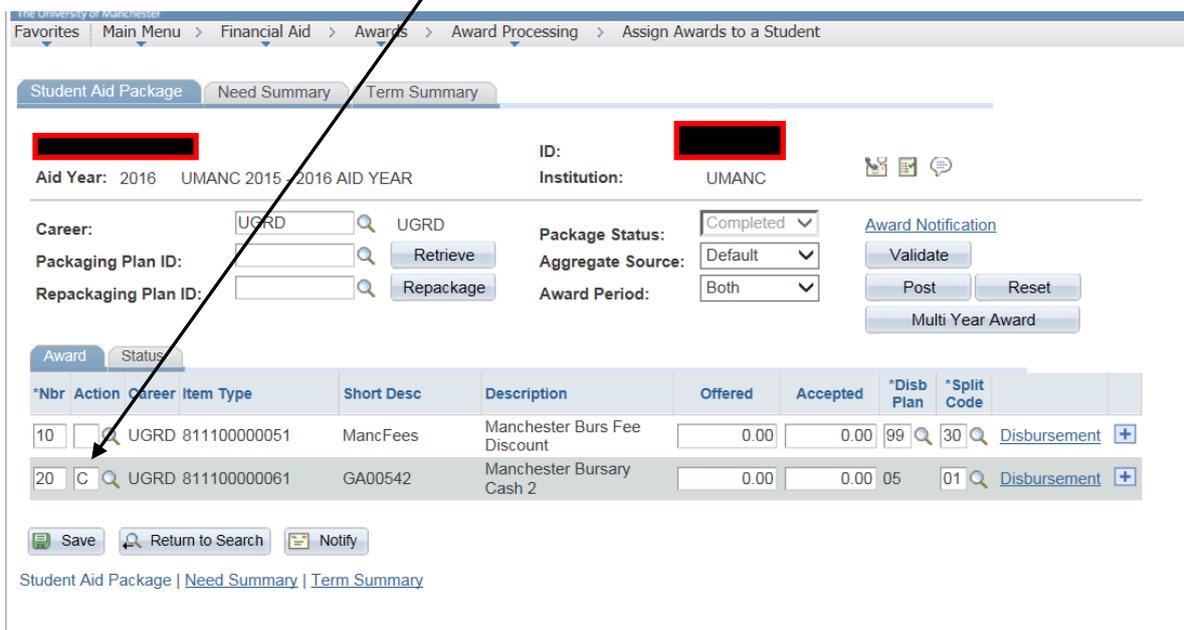
Where part of an award has already been disbursed you have to amend the award to reflect the instalments already processed.

Check what has already been disbursed by clicking on the disbursement link

In this example a total of £2,342.89 (£1171.48 + £1171.41) has already been disbursed.

Once you've found out the amount already disbursed click OK, which takes you back to the assign awards screen.

Next type over the existing award line, as shown below, as if you were entering an award for the disbursed amount of £2,342.89. Don't forget to put a 'B' in the action field!

Validate the award then click on the disbursement link.

The offered amounts for each instalment must match the disbursed amounts, to the penny.

PLEASE NOTE THIS STEP IS EXTREMELY IMPORTANT IN ORDER TO ENSURE DUPLICATE PAYMENTS ARE NOT GENERATED.

If the offered amounts don't match the disbursed amounts exactly, click on the Custom Split box, which allows you to amend the offered amounts to ensure they match the disbursed amounts to the penny.

Once you are satisfied the offered amounts match the disbursed amounts, click ok. This returns you to the assign awards screen, where you need to click 'post'.

That's it job done! **If in doubt contact the Funding team in the Student Services Centre either via email at funding@manchester.ac.uk, or by calling ext. 69902.**

Partial cancellation of an award

There are various scenarios when an award may need to be only partially cancelled. For example, when a student discontinues or when a funded student goes on an unpaid interruption period (rather than paid sick leave). Payments in respect of the affected period may need to be cancelled.

PLEASE NOTE, AS WITH FULLY CANCELLING AN AWARD, IF AMOUNTS HAVE BEEN DISBURSED YOU HAVE TO MAKE SURE THE VALUE OF MONTHLY INSTALMENTS ALREADY DISBURSED REMAIN UNCHANGED.

Check what has already been disbursed by clicking on the disbursement link

If a student is taking an unpaid interruption, before amending their award you need to determine the total value of awards already disbursed by clicking on the disbursement link.

In this example, let's presume their unpaid interruption is for June and July, and you want their stipend to resume in August. First add up all the instalments already disbursed from October to May (£12,478.83), then add on payments due in August and September (£1,666.66 x 2). This gives a total amount due of £15,812.15.

Award Disbursement Detail

Sequence: 10   Item Type: 821800000331   Net Award Amount: $19,145.47
Disbursement Plan: 99   *Split Code: 04   ☐ Custom Split

Disbursement Distribution — First 1-12 of 12 Last

Disb ID	Description	Term	Award Period	Offered	Accepted	Net Disb Balance	Disbursed
01	October	1151	Academic	1,525.42	1,525.42	1,525.42	1,525.42
02	November	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
03	December	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
04	January	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
05	February	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
06	March	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
07	April	1151	Academic	1,666.70	1,666.70	1,666.70	1,666.70
08	May	1151	Academic	1,666.66	1,666.66	1,666.66	1,666.66
09	June	1151	Academic	1,666.66	1,666.66	1,666.66	0.00
10	July	1151	Academic	1,666.66	1,666.66	1,666.66	0.00
11	August	1151	Academic	1,666.66	1,666.66	1,666.66	0.00
12	September	1151	Academic	1,666.66	1,666.66	1,666.66	0.00

Once you've worked out the revised amount of their award click OK, which takes you back to the assign awards screen.

Next type over the existing award line, as shown below, as if you were entering an award for the revised amount of disbursed amount of £15,812.15.

Validate the award then click on the disbursement link.

The system will attempt to recalculate the remaining instalments, so you will need to click on Custom Split.

Award Disbursement Detail

*Sequence: 10   Item Type: 821800000331   Net Award Amount: $15,812.15

Disbursement Plan: 99   *Split Code: XX 🔍   ☑ Custom Split

Disbursement Distribution   Personalize | Find | 🔳 | 🔜 First ◀ 1-12 of 12 ▶ Last

Disb ID	Description	Term	Award Period	Offered	Accepted	Net Disb Balance	Disbursed
01	October	1151	Academic	1,525.42	1,525.42	1,525.42	1,525.42
02	November	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
03	December	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
04	January	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
05	February	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
06	March	1151	Academic	1,524.01	1,524.01	1,524.01	1,524.01
07	April	1151	Academic	1,666.70	1,666.70	1,666.70	1,666.70
08	May	1151	Academic	1,666.66	1,666.66	1,666.66	1,666.66
09	June	1151	Academic	0.00	0.00	0.00	0.00
10	July	1151	Academic	0.00	0.00	0.00	0.00
11	August	1151	Academic	1,666.66	1,666.66	1,666.66	0.00
12	September	1151	Academic	1,666.66	1,666.66	1,666.66	0.00

OK   Cancel

This will allow you to amend the payments so that June and July are zero, and August and September are for the correct amount. Please note the offered amounts for each instalment already disbursed must match the disbursed amounts, to the penny.

Once you are satisfied the amounts are correct click ok. This returns you to the assign awards screen, where you need to click 'post'.

Where only a partial cancellation of an award is required please feel free to contact the Funding team in the Student Services Centre either via email at funding@manchester.ac.uk, or by calling ext. 69902.for advice on making the change.

Use of Multi Year Option on Campus Solutions

Awards should only be assigned on Campus Solutions for a 12 month period at a time, and each financial aid year covers the period from October to September, so for example the financial aid year 2018 covers payments due from 1st October 2017 to 1st September 2018 inclusive.

Where a student is a mid year registrant awards for the full a twelve month period should be split across two financial aid years using the multi year option on Campus Solutions. For example, a student registering in January due 12 monthly instalments of their stipend, you would assign the first nine months of the award (January through to September) for the current financial aid year on the assign awards screen in the normal manner using the appropriate split code. The remaining three months due October to December are then recorded using the multi year option available on the assign awards screen.

E.g. January 2018 starter receiving £1000 a month for 12 months. Enter £9,000 for the period January 2018 to Sept 2018 on the assign awards screen as detailed above, selecting the appropriate split code for 9 month January start. For the remaining £3,000 for Oct 2018 to December 2018 you need to record on the Multi Year Award screen. On the main assign awards screen click on the Multi Year Award button and it takes you to the following screen.

Simply enter 2019 for the Aid Year as the payment you are entering relates to Oct 2018 to Dec 2018. Enter the student's career as shown on the assign awards screen. Search for the item as you have done on the assign awards screen. Enter the disbursement plan, split code and relevant amount.

Once you are happy click the Save button. There is no validation and posting on the multi year awards screen.

PLEASE NOTE THE MULTI YEAR AWARD SCREEN SHOULD BE REGARDED SIMPLY AS A NOTE PAD TO RECORD FUTURE YEAR AWARDS. At the end of each financial aid year the Funding Team will automatically transfer the information recorded on the Multi Year Awards to the assign awards screen for the new Financial Aid year in mid August.

Payment of prizes and awards to final year students

Should the need arise for Schools to process an award, such as a prize, to a student who is reaching the end of their studies the following issues need to be considered:

1. In order for the award to be processed via Campus Solutions it must be entered and disbursed prior to the student's status being updated to 'completed'. Please note if an award is entered on Campus Solutions after a student's status has been updated to 'completed' it will <u>NOT</u> be processed automatically.

2. Where a student's status has already been updated to 'completed' then any award due to that student must be paid by submitting a written request to the Accounts Payable Office in Finance, who will process the payment via the sundry payments system.

Any queries regarding this process should be forwarded to Patrick Ryan, Student Services Manager (Financial Support), Student Services Centre, 0161 275 8548 or via email to patrick.ryan@manchester.ac.uk

Checking if an award has been entered and disbursed on Campus Solutions

Log on to Campus Solutions and navigate to the following screen

Home / Financial Aid / Awards / Award Processing / Assign Awards to a Student

Enter Student ID and ensure Aid Year is populated (eg. 2018 is 2017/18 academic year, 2019 is 2018/19 etc.).

Should bring up the following screen.

If no award is shown then the student should be referred back to the relevant School Administrator.

If an award is shown click on the disbursement link to see if the relevant instalment has been disbursed.

If it has been disbursed refer to the Funding team in SSC to check Oracle Financials and see if the award has actually been paid.

Award is not disbursed on Campus Solutions

If on the assign awards screen you click on the disbursement link and nothing has been disbursed for the relevant period this indicates Campus Solutions is blocking payment for one or more of the following reasons:

1. The student's most recent registration status shows them as not having fully completed registration.

    For example, when the student has been academically term activated for 2017/18 but they have not completed registration the system will prevent payment of awards. However, if a student has a financial award assigned to their 2017/18 financial aid record, but their most recent registration status still shows them as fully registered, e.g. for 2016/17, the system will release payment. Therefore, important not to enter awards a new year until student's record has been correctly rolled forward.

2. The student's most recent effective date on their program plan shows them as either:

    Withdrawn
    Discontinued
    Completed
    Interruption

    A common issue in this regard relates to students transferring from a Masters programme to a PhD. The effective date of completion of the Masters programme might be 1st November 2017, but the effective start date of their PhD is 1st September 2017. Whilst both these dates might be correct, the system only refers to the most recent effective date, which in this example shows the student as having completed on 1st November. Therefore, the system considers the student completed and any further awards are automatically blocked.

    The Funding team do have the functionality to override the disbursement rules and push awards through to Oracle Financials, but this should only be done once the issue has been referred back to the School, and the student's record checked and updated if necessary.

3. The payment isn't due to made until some point in the future.

4. There is an error with the item type setup. No way for School users to check this, simply a case of referring the issue to the Funding team in SSC for checking.

Example of change in attendance mode

The following are examples of changes in the mode of attendance for a student and the impact this has on their financial award:

a)   Interruption

A student entitled to a stipend paid in twelve monthly instalments over the course of an academic year is placed on interruption with their program updated on 26th January 2018, with an effective date for the interruption of 1st January 2018.

Because the record has only been updated on 26th January, the stipend due on 1st February will already have been disbursed and processed via Oracle Financials, therefore, the School will need to decide if they wish to contact the student to request repayment.

Assuming the return from leave of absence date has been included in the program plan, payments will re-commence from that date, and will pick up any 'missed' instalments. So in the above example, if the effective date of the return from leave of absence was 1st May 2018, once we arrive at that date the system will look to process any instalments that have not been disbursed during the period of interruption. As a result, if awards remain on the system for 1st March, 1st April and 1st May these will be automatically be picked up on 1st May and processed for payment. Schools, therefore, need to determine if students are eligible to receive awards during their period of interruption.

If students are due to receive awards during their period of interruption you need to inform the Funding Team in Student Services Centre of the need to manually disburse awards on a monthly basis.

 If students are not due the award then the award needs to be updated in Campus Solutions (for instructions on how to amend awards please refer to page 14 of this document) otherwise payments in respect of the period of interruption will be processed once the student returns.

b)   Withdrawal

If a student's program plan is updated to withdrawn or administrative withdrawal then payment of their awards will cease from the effective date of the withdrawal.

Whilst no further awards should be processed it is good practice to cancel any remaining instalments that might still be awaiting disbursement on Campus Solutions (for instructions on how to amend awards please refer to page 9 of this document).

However, if the withdrawal is retrospective, for example a withdrawal with an effective date of 1st February, but only recorded on Campus Solutions on 5th March, then the student will have received payments due on the 1st February and 1st March. It will be the School's responsibility to decide if they wish to contact the student to request repayment.

If you have any questions regarding any of these arrangements please contact a member of the Funding team, either by email at funding@manchester.ac.uk, or by calling ext. 69902