

Copying an Award Entry Batch

PATH: Main Menu > CAL Components > Financial Aid > Award Entry > Administer Batch Ext Awards

This job aid will cover how to copy an award entry batch.

Examples of when to make a copy of an Award Entry Batch:

- If you need to edit a submitted batch **after** it has been Approved and Posted. You will do this by copying an existing Award Entry Batch to the current aid year. See the job aid on Revising a Posted Award Entry.
- If you wish to copy a batch from this Aid Year into the next Aid Year. This will help save time when you have recurring awards across aid years.

In this example, we are copying a current Award Entry Batch to the next aid year and making minor changes to the awards. Because we are copying into a new aid year, we do not have to worry about impacting any existing awards.

1. Search for the original Batch

If you know the exact Batch Number, you can enter that in the **Batch Number** field. If you do not know the batch number, but know the name of a student on that batch, the easiest way to find it is to search by student to find which of their batches you wish to edit. Refer to the [Search Student's Awards](#) job aid for instructions on how to search.

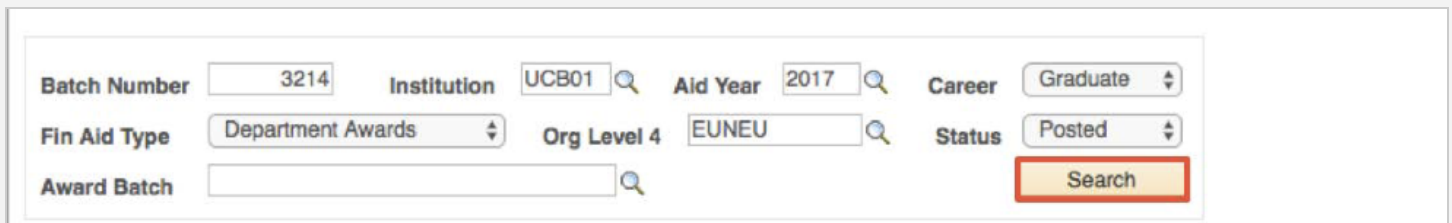
Alternatively, you can do a broad search on the Administer Batch Ext. Awards page. Make sure that the **Institution, Aid Year, Career, and Org Level 4** (aka department) are filled out. Entering the **Org Level 4** is encouraged, but not required if you have the batch number.

Check the defaulted fields. **Fin Aid Type** defaults to **Department Awards** (depending on your access). Make sure it reflects the appropriate choice of **Department Awards** or **Graduate Division Awards**.

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Make sure that the **Status** is **Posted**, not Pending.

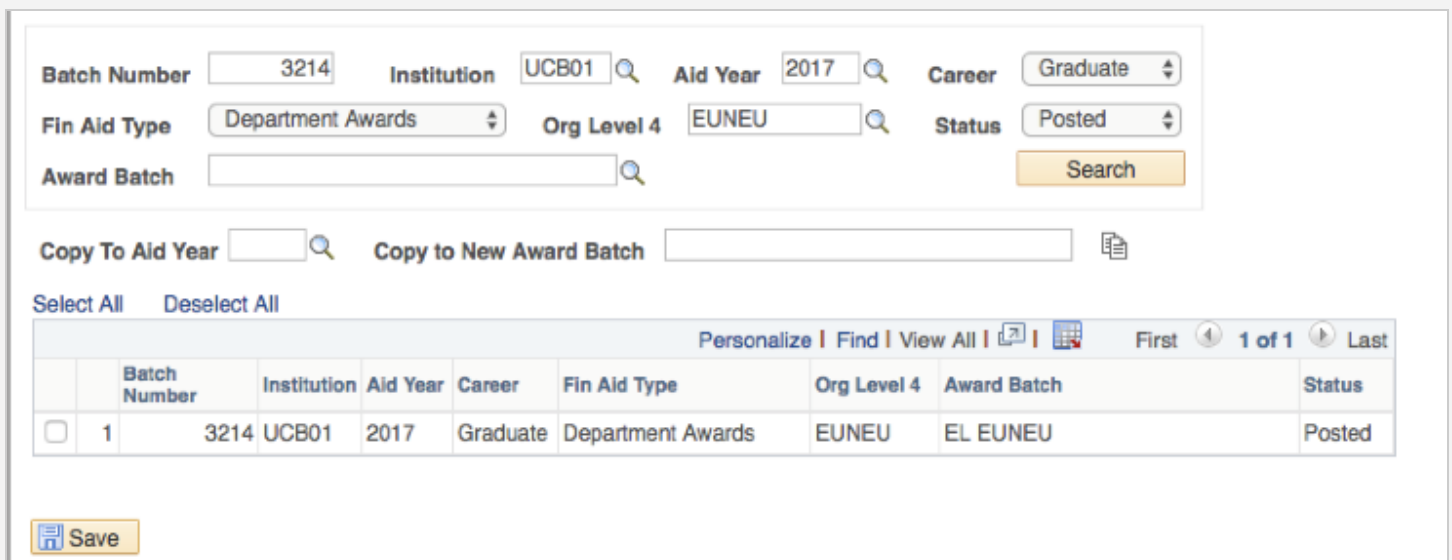
Click **Search** to see the results.



A search form with the following fields: Batch Number (3214), Institution (UCB01), Aid Year (2017), Career (Graduate), Fin Aid Type (Department Awards), Org Level 4 (EUNEU), Status (Posted), and Award Batch (empty). A red-bordered Search button is located at the bottom right.

If the batch number is entered, we will only see one result.

If we did a broader search, we might see several batches and would need to determine which was the correct one.



The search results page shows the same search form at the top. Below it are fields for 'Copy To Aid Year' and 'Copy to New Award Batch'. A table with one result is displayed, and a 'Save' button is at the bottom left.

Select All Deselect All

Personalize | Find | View All | First 1 of 1 Last

	Batch Number	Institution	Aid Year	Career	Fin Aid Type	Org Level 4	Award Batch	Status
☐	1	3214 UCB01	2017	Graduate	Department Awards	EUNEU	EL EUNEU	Posted

Save

2. Copy the Award

The award entries matching your criteria will display.

Click the **checkbox** to the left of the **Batch Number** of the Award Entry Batch you wish to copy. Enter the **Aid Year** into the **Copy to Aid Year** field. In this example, we are copying to a new Aid Year.

Next, enter a new name in the **Copy to New Award Batch** field.

Click the **Copy** icon next to the **Copy to New Award Batch** field.

The screenshot shows a search form with the following fields: Batch Number (3214), Institution (UCB01), Aid Year (2017), Career (Graduate), Fin Aid Type (Department Awards), Org Level 4 (EUNEU), Status (Posted), and Award Batch. Below the search fields are two input fields: "Copy To Aid Year" (2018) and "Copy to New Award Batch" (EL EUNEU '18). A "Search" button is located to the right of the "Award Batch" field. Below the input fields are "Select All" and "Deselect All" buttons. A table displays the search results with columns: Batch Number, Institution, Aid Year, Career, Fin Aid Type, Org Level 4, Award Batch, and Status. The first row is highlighted with a red border and has a checkbox checked. Below the table is a "Personalize" link and a "Find" button. The table data is as follows:

	Batch Number	Institution	Aid Year	Career	Fin Aid Type	Org Level 4	Award Batch	Status	
☒	1	3214	UCB01	2017	Graduate	Department Awards	EUNEU	EL EUNEU	Posted

A message will pop up, saying the copy has been successful.

Click OK to acknowledge this message

The screenshot shows a "Message" dialog box with the text "Successfully copied External Award Batches (26000,110)". Below the text is an "OK" button.

3. View/Update the Copied Award

Next, we will navigate to the **Award Entry** page via the menu links at the top of the page (click **Award Entry > Award Entry**).

A Save Warning box will pop up, asking if we want to save the **Search Criteria** (not the copy).

You do not have to **Save**, despite what the message implies.

Click **No** to dismiss the message.

The screenshot shows the Berkeley Student Information Systems interface. At the top, a navigation menu includes 'Award Entry', which is highlighted with a red box. Below the menu is a search form with fields for Batch Number (72), Institution (UCB01), Aid Year (2017), Fin Aid Type (Department Awards), Org Level 4, and Status (Posted). A 'Search' button is present. Below the search form is a 'Copy To Aid Year' field (2017) and a 'Copy to New Award Batch' button labeled 'REVISE BATCH/72 NEWFUNDNEWAMN'. A table below shows a single row with Batch Number 1, Institution 72 UCB01, Aid Year 2017, Career Graduate, Fin Aid Type Department Awards, Org Level 4 COREC, Award Batch DEPT AWARD SPH 080516, and Status Posted. A 'Save Warning' dialog box is open in the foreground, asking 'Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.' with 'Yes' and 'No' buttons. The 'No' button is highlighted with a red box.

On the Award Entry page, it should default to the **Find an Existing Value** tab. We can now search for the copy we made.

If you have set up the **Aid Year** to default, it will show the current year. Be sure to search for the aid year to which we copied the Award Entry Batch. In some cases you will be copying into the same year to make a revision, but in this case we are setting this up for the next year.

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

Optional: You can include the “name” in the **Award Batch Package** field.

Click **Search**.

Award Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Academic Institution: begins with UCB01

Aid Year: begins with 2018

Academic Career: = Graduate

Financial Aid Type: = Department Awards

Organization Level 4: = EUNEU

Award Batch Package: contains

Awarding Package Status: = Pending

Created By: begins with

Created Datetime: >=

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

The results display below.

In this example, we have a new Batch Number 8111.

Click anywhere in the line to make the appropriate edits.

Search Criteria

Academic Institution: begins with UCB01

Aid Year: begins with 2018

Academic Career: = Graduate

Financial Aid Type: = Department Awards

Organization Level 4: = EUNEU

Award Batch Package: contains

Awarding Package Status: = Pending

Created By: begins with

Created Datetime: >=

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All

Batch Sequence Number	Academic Institution	Aid Year	Academic Career	Financial Aid Type	Organization Level 4	Award Batch Package	Awarding Package Status	Created By	Created Datetime
8111	UCB01	2018	Graduate	DeptAward	EUNEU	EL EUNEU '18	Pending	10203097	05/17/2017 12:43PM

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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 3214").

This is one benefit of copying the original batch, rather than creating a new entry. Especially when you are doing a revision, it is helpful to be able to reference the original batch.

Batch Number 8111 Department Awards Revised From Batch Nbr 3214

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

Org Level 4 Helen Wills Neuroscience Inst Award Batch EL EUNEU '18

Status Pending Comments Created By Candace Greenhouse 05/17/17 12:43PM

Approver [Search] Post

Select All Deselect All Delete Add

Awards Personalize | Find | View All | First 1 of 1 Last

Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority	Disburse Plan	Split Code
1 945100055580	[Search]	Departmental Award		Active	3708.00	Refunds/Stipends Only	Fall and Spring	Fall Spring

Select All Deselect All Delete Add Student(s) Search

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

Student ID	Name	Award Summary
1 24090816	Gina Grad	[Image]

Apply Disbursements Delete All Replace Disbursements using first row values

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

Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1 945100055580	Departmental Award	24090816 Gina Grad	MB	MB	3708.00

ID	Date	Amount
1		0.00

4. Update the Awards Section

Because this is a copy to a new aid year, we can now make whatever changes are needed. Adding/deleting Item Types, adding or deleting a student, changing the Disbursement and Split codes, etc.

However, if you have copied this award batch in order to do a revision for the same aid year, please see the [Revising a Posted Award Batch](#) job aid for assistance. Revisions within the same aid year can cause issues if the same Item Type is used, and if one is not careful with the Disbursement plans and Split codes.

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