

**AGCA Meeting: OASIS Screens Brown Bag**

Wednesday March 9, 2012

1:00-2:30pm

Terasaki Life Sciences Building (Room 1100)

Minutes

Members present: Jay True, Barbara Van Nostrand, Lindsay Kovner, Joy Miller, Jessica Shim, Alexis Sexauer, Jocelyn Yamadera, Elena Mohseni, Gail Panatier, Sue Ellen Parsee, Brittany Hawkins, Lisa Lee, Michelle Anderson, Rebecca Greenberg, Roxy Naranjo, Josie Wei, Carol Yasutomi, Hayley Safonov, Irina Tauber, Shelli Shepherd, Dean Dacumos, Lance Watsky, Michelle Welch, Valerie Shepard

Sherman Chew, Manager, Graduate Division Financial Services

Sherman explained that he would review OASIS screens that:

- A. provide consolidated information
- B. help track student funding
- C. show the activity on a student's BAR account

In order to gain access to these screens in OASIS, you will need to contact your dept. CAO or DSA as they have the authority to grant you this access.

A. Consolidated Information Screens

- 505: FAM Graduate Support Data Maintenance
  - Shows TOP exam score and date, their citizenship and visa status and their home department
- GPB: Graduate Progress Browse
  - Shows ATC date, degree date and the last quarter that a student is eligible for the NRT waiver
- RD1: Registration Detail 1
  - Shows the ATC term, the date that fees were paid and if the student is registered In Absentia by term
- 404: Student Account Information
  - Shows BAR information in summary format.
  - Shows if Bruin Direct is set up or not. If not, the default will read "Mail Option"

- Please note that Grad Division can no longer hold checks for pick up.

**B. Student Funding Screens**

- 320: FAM – Award Detail Screen
  - Shows funding that has been posted/disbursed. For allocation funding, one subcode is used to post the award and another to disburse. See chart below. Special Fellowship and Form 10 awards use only one subcode to post and disburse awards which begin with “6”. Funding that begins with “8” are Financial Aid related.

**Subcodes Used to Process Allocation Funding**

<b>Category</b>	<b>Subcode Used to Post Award</b>	<b>Subcode Used to Disburse Award</b>
Fees	71 and 3 digit major code	64006
NRST	72 and 3 digit major code	64005
Stipend	73 and 3 digit major code	68704

- 319: FAM – Award Summary
  - Shows the total funding (inclusive of fellowships, remissions and financial aid) that students have received and does not break it down by quarters or months. Funding is broken out by Summer and Academic Year and the categories “Offer”, “Accept” and “E/P” (earned and paid).
- 306: FAM – Document Tracking
  - Shows required document tracking like FAFSA, Glacier (GDTSR mnemonic) and the Financial Statement (GDFIN mnemonic).
  - A notation of “C” means that the form has been submitted and it is “Complete”. A document request displaying “N” & “Q” means the document has been requested and is pending submission.
  - International students receiving a stipend need to fill out Glacier forms (if not already completed) and the Financial Statement with respect to allocation or Special Fellowship funding. Stipend based Form 10s only requires Glacier.

- International students only receiving allocation or Special Fellowship fee payments or NRST do not need Glacier but do need a Financial Statement. Form 10 fee or NRST based funding do not require any documents.
- US Citizens or Permanent Residents need to complete a FAFSA with respect to allocation or Special Fellowship funding. No documents are required for any type of Form 10 funding.

### C. Tracking BAR Activity

- 409: Account Snapshot
  - Shows BAR activity by term.
  - If there is no minus sign by a line item, then it is a charge to the student's account.
  - If there is a minus sign then the line item denotes a credit or a payment.
  - Refunds to the student do not show a minus.
  - Students have 30 days to pay any miscellaneous charges that are posted to their BAR account before a delinquent fee is assessed and a hold is placed on their account.
  - You can copy and paste the information from this screen onto a word document so that you can see an entire term at once since the information can overlap several pages on OASIS. Paste using Courier New font at size 9 to get the right fit.
  - Sherman recommends ignoring any line items that incorporates the description "OVERAWARD" in the transaction description as shown below.

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C GRAD OVERAWARD CHG
P GRAD OVERAWARD PAY
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- 419: Chronological Account History
  - Shows BAR activity by date.
  - Identifies all payments and charges in date order. Rules for reviewing the data are identical to screen 409.
  - If you are looking for a particular date range, you can jump to that range by entering a specific page to move forwards or backwards. This is located on the bottom right hand side of the screen.
  - Note that the student's view of their BAR account is very different from what we see. You can always ask them to send you a screen shot of what they see to help answer their questions.

- 412: Check/EFT Register
  - Shows how a payment has been made to the student, through Bruin Direct or via a mailed check. If “EFT” is noted, then it is through Bruin Direct. If “MAIL” is noted, then the check has been mailed to the student’s local mailing address.
  - This screen will no longer show the bank name if a Bruin Direct deposit was made.
  - Students will receive the deposit into their bank accounts 3-5 business days from the date that is posted under “CHECK DATE”.
  - Mailed payments are processed once a week on Mondays only. In order for a check to be mailed on Monday, the payment must be processed by the preceding Thursday.
  
- 048: Holds
  - Shows any holds that are on the student’s account and which office placed the hold.