CHAPTER 1

Calculating Tuition and Fees

This chapter discusses how to:

- Calculate tuition for a single student.
- Calculate tuition for multiple students.
- Assign student waivers.
- Lock in a minimum tuition amount.
- Recalculate tuition and fees after enrollment cancellation.
- Change, calculate, and post optional fees.

Calculating Tuition for a Single Student

Calculate tuition for a single student when you need to see immediate results.

Pages Used to Calculate Tuition for a Single Student

Page Name	Definition Name	Navigation	Usage
Tuition Calculation	STDNT_TUITION_CALC	Student Financials, Tuition and Fees, Tuition Calculation	Calculate a student's tuition.
Tuition and Fees	TUITION_CALC_SP	Click the Display Tuition and Fees link on the Tuition Calculation page.	Review calculated fees for a single student.
Fees After Calculation	TUITION_CALC_TBL	Student Financials, Tuition and Fees, Review Fees After Calculation	Review calculated fees for a single student.
Calculation Messages	STDNT_TUITION_CALC	Click the Display Errors/Warnings link on the Tuition Calculation page.	Review messages generated during tuition calculation for a single student.
Fee Calculation Messages	TUIT_CALC_MESSAGES	Student Financials, Tuition and Fees, Review Calculation Messages, Fee Calculation Messages	Review messages generated during tuition calculation for a single student.

Calculating a Student's Tuition

Access the Tuition Calculation page (Student Financials, Tuition and Fees, Tuition Calculation).

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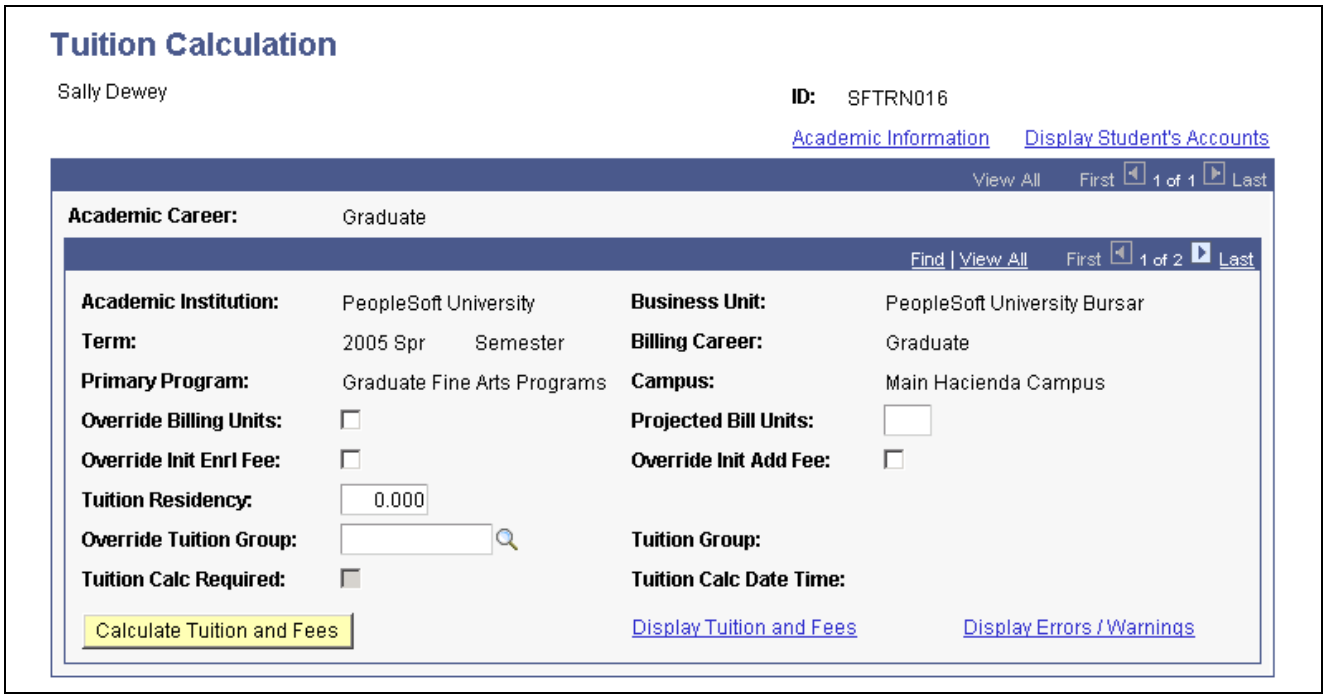

Tuition Calculation page

Academic Information Click to access the Academic Information page.

Display Student's Accounts Click to access the Student Accounts page.

Note. If you review the student's account before calculating tuition, information might not be available.

Override Billing Units Select to calculate tuition based on anticipated units.

Projected Billing Units If you set billing units as a part of tuition calculation, the system displays the number of the student's projected billing units. You can edit this field.

Override Init Enrl Fee (override initial enrollment fee) Select to override an initial enrollment fee.

Override Init Add Fee (override initial add fee) Select to override an initial add fee.

Tuition Residency This field displays the tuition residency that is calculated for the student. You can override the value and calculate it again to post the changed amount.

Override Tuition Group Enter a tuition group other than the one to which the student is already assigned. When you calculate the student's tuition using this page, the system uses the tuition group that you enter in this field instead of the previously assigned group.

Tuition Group Until tuition and fees have been calculated at least once, this field is blank. After calculation, the field displays the tuition group into which the student was placed upon calculation.

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Tuition Calc Required (tuition calculation required) — The system selects this check box when changes have been made to the student's enrollment or other attributes (such as placement in a student group) that require an initial or new calculation of tuition and fees.

Tuition Calc Date Time (tuition calculation date time) — The system displays the date and time that tuition was last calculated.

Display Tuition and Fees — Click to access the Tuition and Fees page, where you can review charges for tuition and fees that have been calculated and charged to the student's account.

Display Errors/Warnings — Click to access the Calculation Messages page, where you can review all messages associated with tuition and fees calculation for the student. This field is available only if the corresponding selections have been made on the Display Errors/Warning Controls page in the Tuition Calculation Controls component (CALC_CNTL_TABLE).

See Also

lssf, Setting Up Fees and Tuition Groups, Setting Up Transaction Fees

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Establishing Tuition Calculation Controls

Calculating Tuition for Multiple Students

You can calculate tuition for multiple students using a batch process. You can define this process so that it automatically calculates tuition at times when processing demands are low.

Pages Used to Calculate Tuition for Multiple Students

Page Name	Definition Name	Navigation	Usage
Tuition for Multiple Students	RUNCTL_SFPBCALC	Student Financials, Tuition and Fees, Calculate Batch Tuition, Calculate Tuition, Tuition for Multiple Students	Calculate tuition in batch.
Fees After Calculation (Batch)	TUIT_CALC_B_PANEL	Student Financials, Tuition and Fees, Calculate Batch Tuition, Review Fees After Calculation, Fees After Calculation (Batch)	Review fees after batch tuition calculation.
Fee Calculation Messages (Batch)	CALC_MSG_B_PANEL	Student Financials, Tuition and Fees, Calculate Batch Tuition, View Fee Calculation Messages, Fee Calc Messages (Batch)	Review messages resulting from batch tuition calculation.

Calculating Tuition in Batch

Access the Tuition for Multiple Students page (Student Financials, Tuition and Fees, Calculate Batch Tuition, Calculate Tuition, Tuition for Multiple Students).

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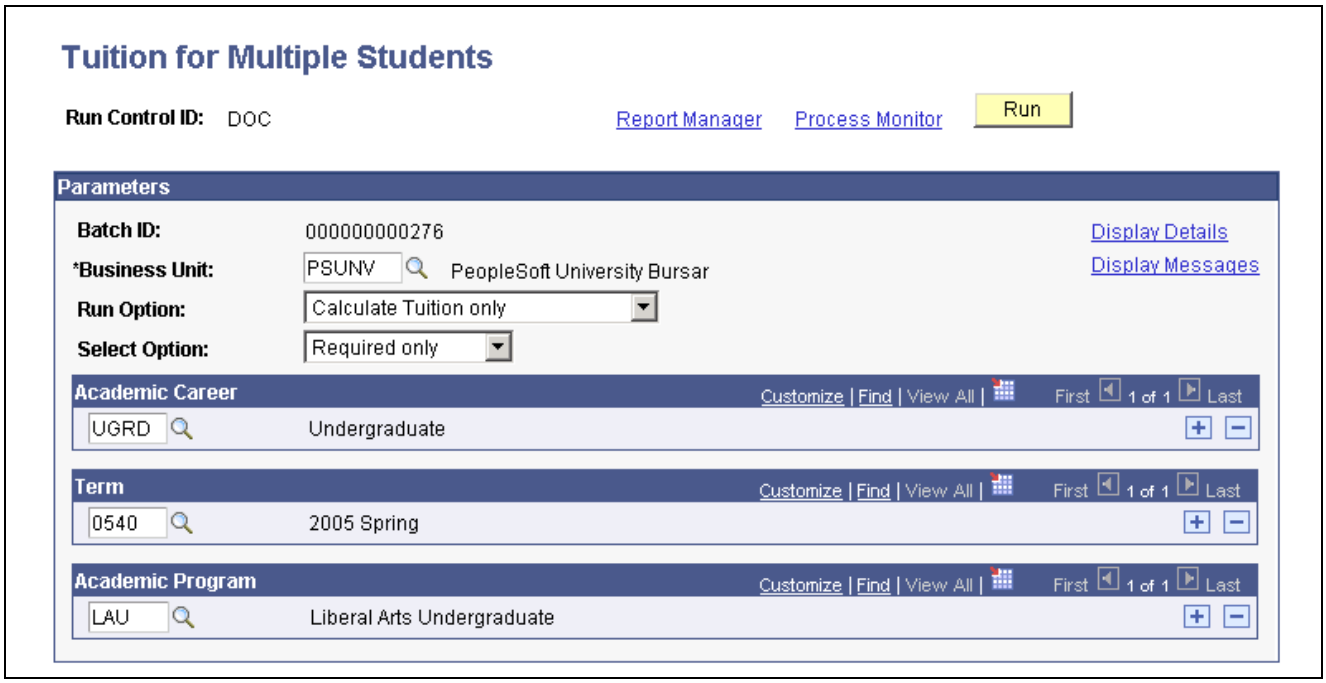

Tuition for Multiple Students page

Business Unit Enter the business unit for which you are calculating the tuition.

Run Option Enter the appropriate run option:

Warning! Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Values are:

Calc and Post Tuition, Waivers: (calculate and post tuition, waivers): Calculates and posts tuition and fee waivers for all students who meet the criteria that you select on this page.

Calculate Tuition only: Calculates but *does not post* tuition for all students who meet the criteria that you select on this page. This option does not calculate or post waivers.

Calculate Waivers only: Calculates but *does not post* waivers for all students who meet the criteria that you select on this page. This option does not calculate or post tuition.

Calculate and Post Tuition: Calculates and posts tuition only for all students who meet the criteria that you select on this page.

Calculate and Post Waivers: Calculates and posts fee waivers only for all students who meet the criteria that you select on this page.

Post Tuition only: Posts tuition that you have already calculated.

Post Waivers only: Posts waivers that you have already calculated.

Select Option Select how students should be selected for tuition calculation.

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Warning! Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Values are:

All students: Calculates tuition for all students, regardless of when their tuition was last calculated.

Required Only: Calculates tuition for students who meet the criteria in the page and for whom the tuition calculation required check box is set to *yes.*

Display Details Click to review the Fees After Calculation (Batch) page.

Display Messages Click to review the Fee Calculation Messages (Batch) page.

Academic Career Enter an optional academic career for which you want to calculate tuition and fees. Leave this field blank to calculate tuition for all careers that are limited by your run option, and select option settings.

Term Enter the term for which you want to calculate tuition and fees.

Academic Program Enter an optional academic program for which you want to calculate tuition and fees. Leave this field blank to calculate tuition and fees for all eligible students in all academic programs that are limited by your run option, and select option settings.

Assigning Student Waivers

Bundle 27
New

The Assign Student Waivers feature allows you to override student waivers. The values in waiver codes for which the Enable Student Override check box is selected on the Waivers page are available here. When the check box is selected, the waiver calculation process checks the Student Waiver table for the values to use in waiver calculation. You can override the waiver code values for individual students or use a batch process to override the waiver code values for multiple students.

If the criteria options on the waiver code is set to Use Criteria or Use Equation, the tuition calculation process uses the selected criteria to check the student's eligibility for the waiver. However, if the waiver code criteria option is set to No Criteria, then you must manually verify the student's eligibility.

See PeopleSoft Student Financials 9.0 PeopleBook, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Defining Waivers and Waiver Groups.

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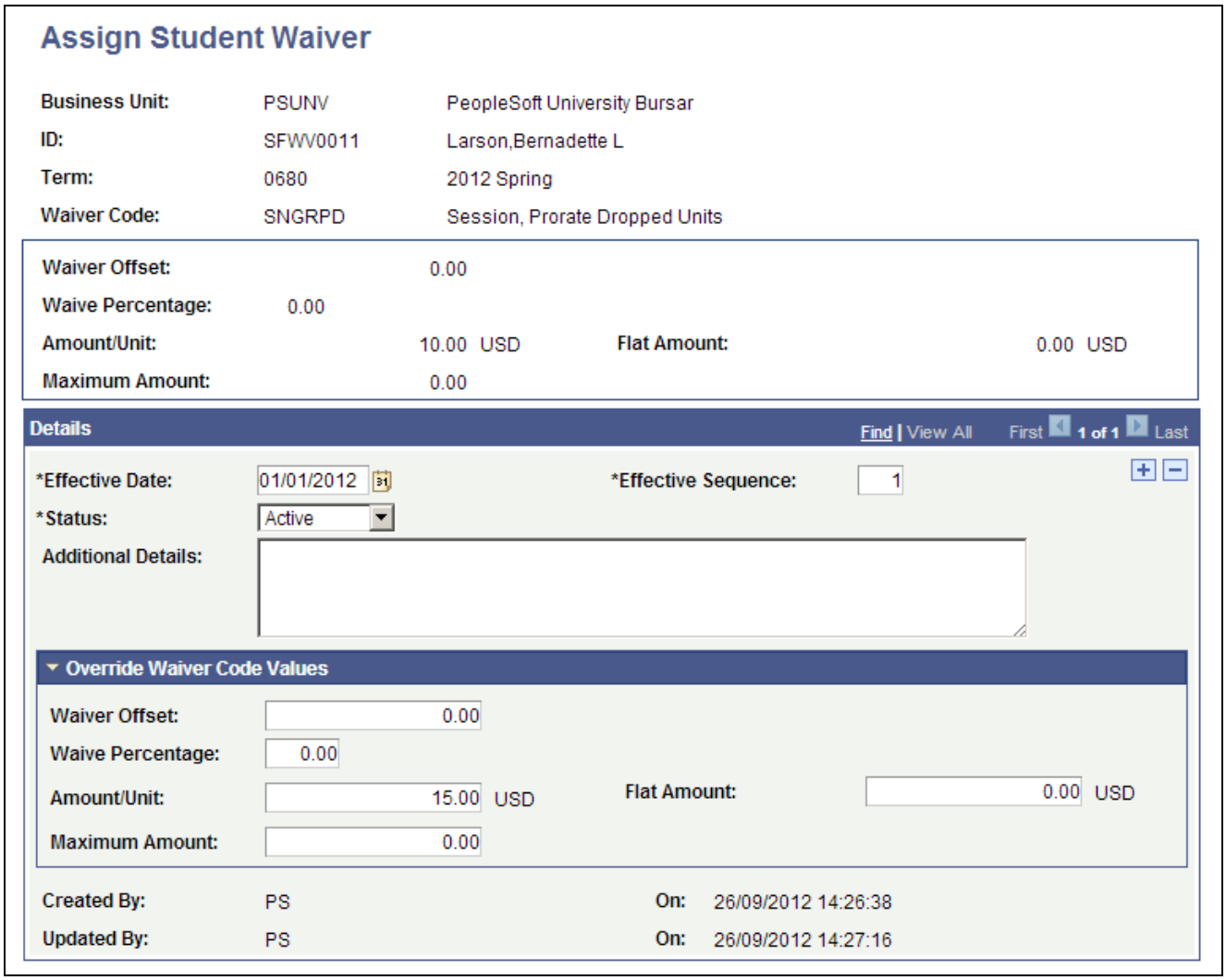
Pages Used to Assign Student Waivers

Page Name	Definition Name	Navigation	Usage
Assign Student Waiver	SSF_STDNT_WAIVER	Student Financials, Tuition and Fees, Assign Student Waiver	Populate the Student Waiver table to manually override the waiver code values for an individual student.
Mass Assign Student Waivers	SSF_RUNCTL_STD_WVR	Student Financials, Tuition and Fees, Calculate Batch Tuition, Mass Assign Student Waivers	Use a batch process to populate the Student Waiver table and override the waiver code values for multiple students.

Assigning Waivers for a Single Student

Bundle 27
New

Access the Assign Student Waiver page (Student Financials, Tuition and Fees, Assign Student Waiver).



Assign Student Waiver page

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The context region that appears above the Details region shows the original values from the Waivers setup page. This serves as a reference point when you override the values.

When you override waiver code values for the first time, the Override Waiver Code Values region shows the original waiver code values you set up. Your subsequent edits will show the latest values used in the override. This region contains the same fields and edits as the Waivers setup page. The fields are optional.

Note. You can also populate the Student Waiver table using Mass Assign Student Waivers.

See PeopleSoft Student Financials 9.0 PeopleBook, Calculating Tuition and Fees, Assigning Student Waivers, Assigning Waivers for Multiple Students.

Effective Date

Enter the date from when the overridden waiver detail is to be used for the student. If you use a future date, the following message appears in the Student Waiver Override region on the finances page: *This student has future-dated waiver overrides.*

See PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, Using the Student Services Center Component, Viewing and Editing an Individual's Information, Viewing a Student's Self-Service Finances Information.

Waiver Offset

Enter an amount the students potentially pay themselves. For example, you might waive all tuition fees for employees, but want them to pay at least 100 USD. Enter *100* in this field, and the system reduces the calculated waiver by 100 USD.

Note. Waiver Offset cannot be used in conjunction with the Waive Percentage, Amount/Unit, or Flat Amount option. You can use Waiver Offset with the Maximum Amount option to limit the total amount of the waiver. Also, if the waiver is attached to a tuition group, the Item Type Group field must be populated.

Waive Percentage

If only a percentage of a fee is to be waived, enter that percentage in this field.

Amount/Unit

If the waiver is based on the amount of units in a student's course load, enter the per unit amount.

Flat Amount

You can waive a flat amount for students who meet the criteria. If you select this option, do not complete the Waive Percentage and Waiver Offset fields.

Maximum Amount

Enter the maximum amount that can be waived relative to the fees per term, session, or class.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, Using the Student Services Center Component, Setting Up the Student Services Center Component

Assigning Waivers for Multiple Students

Bundle 27
New

Access the Mass Assign Student Waivers page (Student Financials, Tuition and Fees, Calculate Batch Tuition, Mass Assign Student Waivers).

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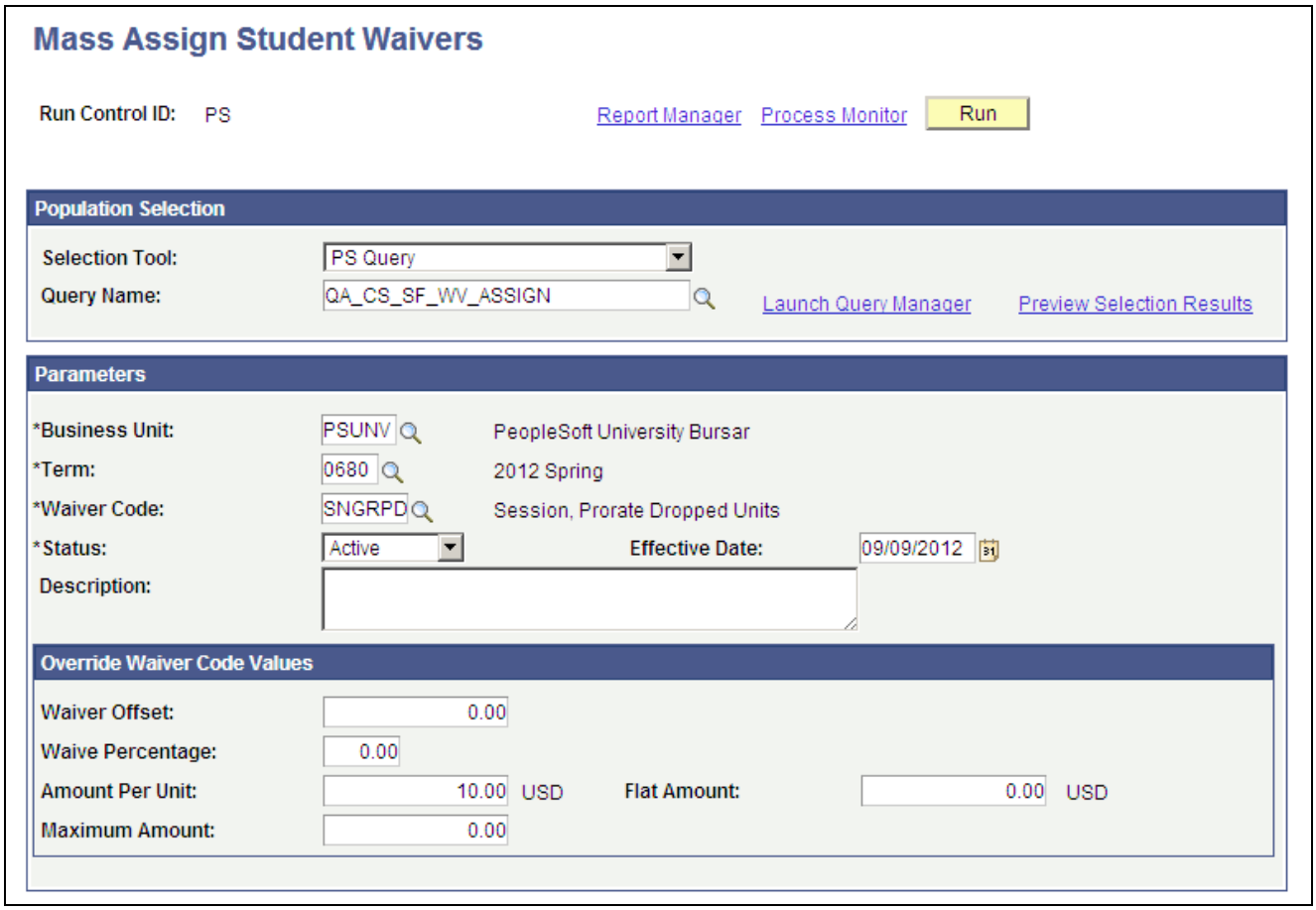

Mass Assign Student Waivers page

The Mass Assign Student Waivers batch process allows you to assign waiver codes and override the default waiver code values for multiple students.

The waiver combinations that you can use when you set up the override are the same as the combinations that you can use on the Assign Student Waiver page.

See PeopleSoft Student Financials 9.0 PeopleBook, Calculating Tuition and Fees, Assigning Student Waivers, Assigning Waivers for a Single Student.

When the batch process is successful, the new values with effective date and sequence are inserted in the Student Waiver table. You can review or edit individual information using the Assign Student Waiver page.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields act the same from within the group box no matter what run control page you are on or what transaction you are processing. If your institution uses a specific selection tool (PS Query, Equation Engine, or external file) to identify IDs for a specific transaction, you must use it.

See PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, Using the Population Selection Process

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Query Name The following query is delivered: QA_CS_SF_WV_ASSIGN.

If you create your own queries, you must include the bind record SSF_STDWVR_BIND.

Parameters

Waiver Code Select the waiver code that you want to assign.

Only waiver codes that are effective at the start date of the selected term and for which the Enable Student Override check box is selected on the Waivers setup page are available here.

Status The Population Selection process can be used to activate or inactivate waivers.

Override Waiver Code Values

For information about these fields, refer to the documentation about the Assign Student Waiver page.

See PeopleSoft Student Financials 9.0 PeopleBook, Calculating Tuition and Fees, Assigning Student Waivers, Assigning Waivers for a Single Student.

Locking In a Minimum Tuition Amount

The Lock In Tuition Amount process enables you to charge students a minimum lock in amount for a fee, regardless of when they drop a class, the number of classes that they drop, or whether fees increase.

Page Used to Lock In a Minimum Tuition Amount

Page Name	Definition Name	Navigation	Usage
Lock In Tuition Amount	RUNCTL_LCK_IN_TUIT	Student Financials, Tuition and Fees, Process Tuition Lock In, Lock In Tuition Amount	Lock in a minimum tuition amount.

Locking In Tuition

Access the Lock in Tuition Amount page (Student Financials, Tuition and Fees, Process Tuition Lock In, Lock In Tuition Amount).

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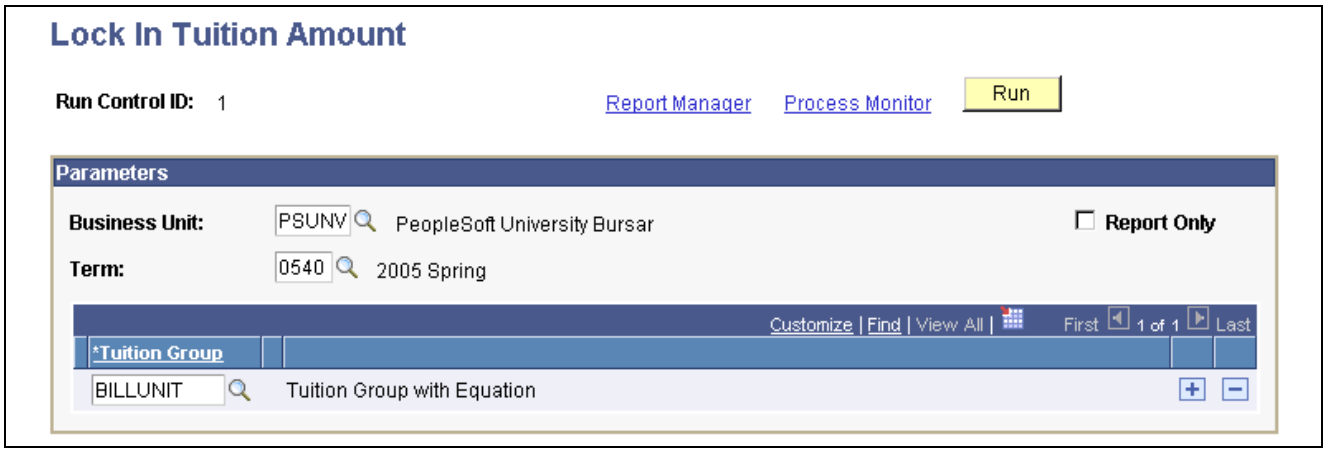

Lock In Tuition Amount page

Business Unit	Enter the business unit for which you are processing the tuition lock.
Term	Enter the term being locked.
Report Only	Select to see the effect of the lock without processing it.
Tuition Group	Enter the tuition group that you want to process.

Recalculating Tuition and Fees After Enrollment Cancellation

When the system selects students during the Enrollment Cancellation process for nonpayment of fees, you must recalculate tuition and fees for those students.

See Also

lssf, Maintaining Receivables, Processing Enrollment Cancellation

Page Used to Recalculate Tuition and Fees After Enrollment Cancellation

Page Name	Definition Name	Navigation	Usage
Recalc for Cancellation (recalculate for cancellation)	RUNCTL_SFPCCALC	Student Financials, Tuition and Fees, Calculate Batch Tuition, Calculate After Cancellation, Recalc for Cancellation	Recalculate tuition and fees after enrollment cancellation.

Recalculating Tuition and Fees After Enrollment Cancellation

Access the Recalc for Cancellation page Student Financials, Tuition and Fees, Calculate Batch Tuition, Calculate After Cancellation, Recalc for Cancellation).

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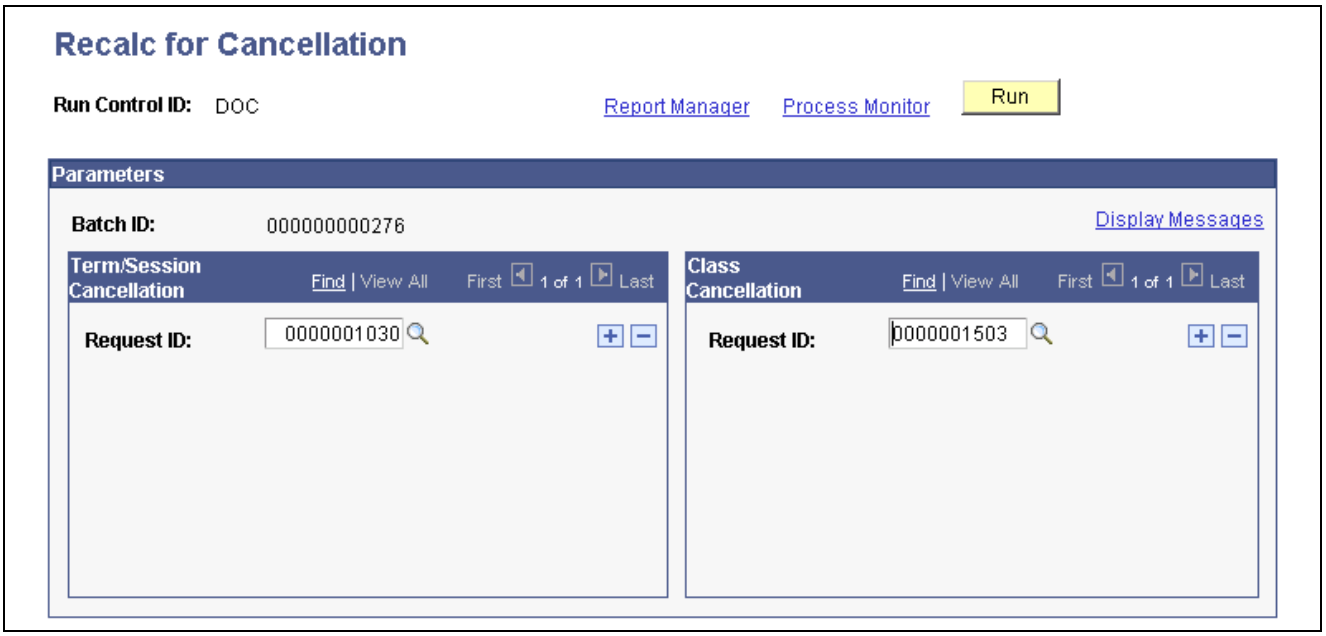

Recalc for Cancellation page

Request ID (request identifier) Enter a request ID for term or session cancellations, class cancellations, or both.

Changing, Calculating, and Posting Optional Fees

This section discusses how to:

- Calculate optional fees for an individual student.
- Override optional fees after the no change date.

Pages Used to Change, Calculate, and Post Optional Fees

Page Name	Definition Name	Navigation	Usage
Optional Fees for a Student	OPT_FEE_STDNT	Student Financials, Tuition and Fees, Assign Optional Fees, Optional Fees for a Student	Calculate optional fees for an individual student.
Optional Fees	OPT_FEE_STDNT_S	Click the Display Optional Fees link on the Optional Fees for a Student page.	Review a student's optional fees.
Optional Fees Override	OPT_FEE_OVERRIDE	Student Financials, Tuition and Fees, Override Optional Fees, Optional Fees Override	Override optional fees after the no change date.

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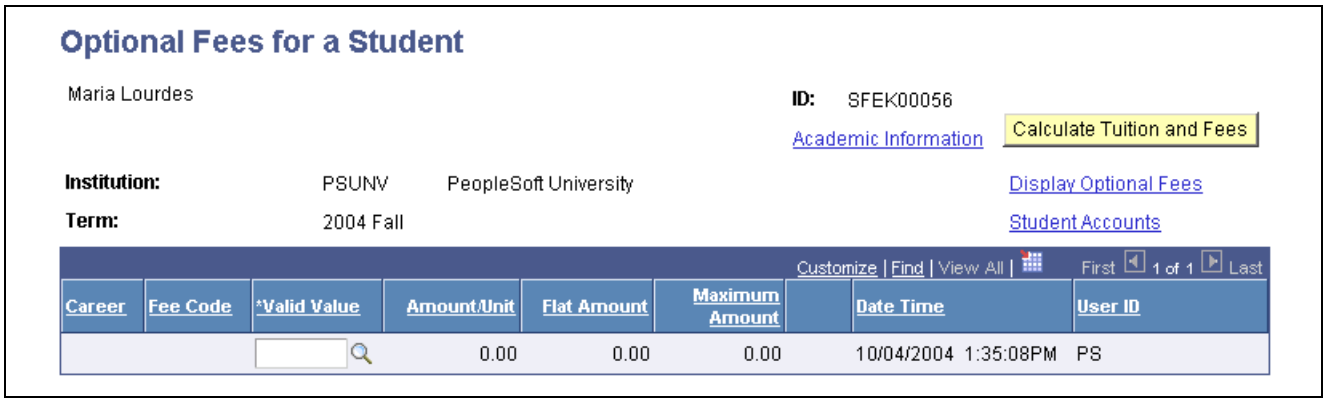
Calculating Optional Fees for an Individual Student

Access the Optional Fees for a Student page (Student Financials, Tuition and Fees, Assign Optional Fees, Optional Fees for a Student).



Optional Fees for a Student page

Career Displays the student's academic career.

Fee Code Displays the fee code of each optional fee that is attached to the student.

Valid Value Enter a value for each fee code. The system displays the default value that you defined on the Optional Fees per Term page. You can override this value. After you select the value, the system displays the amount of the fee in the appropriate field (Amount/Unit or Flat Amount).

Amount/Unit If the optional fee is based on the number of units in which the student is enrolled, the system displays the total monetary amount in this field.

Flat Amount If the optional fee is a flat charge, the system displays the total dollar amount in this field.

Maximum Amount Displays the maximum amount that you defined for the fee on the Optional Fees per Term page.

Date Time Displays the date and time that the optional fee was calculated.

User ID Indicates who entered the charge.

Academic Information Click to display the student's enrollment status.

Calculate Tuition and Fees Click to calculate and post tuition and fees for the student, including optional fees.

Note. After you have saved any changes that you make to a student's optional fees, any tuition calculation process takes the changes into account. That is, you do not need to calculate tuition from this page.

Display Optional Fees Click to display all optional fees that were charged after calculation.

Student Accounts Click to review a summary of the student's entire account and verify that the system correctly posted the optional fees.

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Overriding Optional Fees After the No Change Date

Access the Optional Fees Override page (Student Financials, Tuition and Fees, Override Optional Fees, Optional Fees Override).

This page is identical to the Optional Fees for a Student page.

See Also

lssf, Calculating Tuition and Fees, Changing, Calculating, and Posting Optional Fees, Calculating Optional Fees for an Individual Student

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