CHAPTER 1

Administering Payment Plans

This chapter provides an overview of payment plans and discusses how to:

- Link students to deferral contracts.
- Administer payment plan contracts.
- Administer third-party contracts.
- Enroll multiple students in a payment plan or third-party contract.

Understanding Payment Plans

This section lists common elements and provides an overview of payment plans.

Common Elements Used in This Chapter

Reference Number

Enter an optional reference number for each student on a particular contract. The reference number entry is for information purposes only and does not appear on the student's charges.

Status

This field displays the current status of the contract. Values are:

Active: Select to make the contract available for use. This is the default value for this field until the student has been linked to the contract by posting. After the student has been linked to the contract, the other options become available.

Cancelled: Select to remove the student from the contract.

Hold: Select to prevent new transfers from the plan account but not to discontinue its use completely.

Inactive: Select to discontinue use of the contract.

Not Posted: Indicates that a new or changed contract has not been posted.

Understanding Payment Plans

Using Student Financials, you can create and maintain these types of payment agreements for students with diverse financial needs or responsibilities:

- Deferral contract
- Payment plan
- Third-party contract

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- Collection agreement

Deferral Contracts

Deferral contracts are designed for students who, for whatever reason, need to defer payment of charges for a short period of time. Deferral contracts extend the charge due date for eligible charges. You can link multiple students to one deferral contract definition, or you can create individual contracts to accommodate each student's unique needs.

Payment Plans

Payment plans enable you to offer students the flexibility of paying their education expenses over a period of time rather than in one lump sum. Student Financials provides several choices for you to create and process student payment plans. The three types of payment plans are calculated, existing, and lump sum. These types differ from the deferral contract in that the deferral contract only adjusts the due and billing dates. The calculated and existing payment plans defined in this section actually credit the eligible charges.

- The calculated payment plan enables you to use item type groups to define eligible charges. Also, the calculated payment plan can use the Offset Charges feature. Adjustments to student charges can affect this payment plan. This payment plan may be available through self-service.
- The existing payment plan enables you to manually select individual charges that may be eligible for the payment plan. Adjustments to the student charges can affect this payment plan.
- The lump sum payment plan uses the Charge Priority List feature to determine which charges can be paid by the initial lump sum payment. The initial lump sum payment will be posted to the payment plan account type. Adjustments to the student charges will not have an effect on this payment plan. This payment plan may be available through self-service.

Third-Party Contracts

Third-party contracts are credit agreements between your institution and a third-party sponsor—typically, corporations or government agencies. The third party agrees to sponsor one or more students and pays all or part of their tuition, fees, or expenses. The sponsor establishes all parameters regarding what portion of which expenses it pays.

When a student is linked to a third-party contract, a credit is applied to the student's account, the *receivable* is moved from the student's account to the sponsor's account, and the student's sponsor is sent a bill. This contract type is especially beneficial for students in a retraining program or an employee education program who may not have the cash to pay the tuition and fees in advance and then seek reimbursement. If the sponsoring organization does not pay, the temporary credit is reversed and the student is liable for the payment.

Collection Agreements

Often, when a student or external organization agrees to repay a past due debt, they are unable to pay the full balance in one lump sum. Use a collection agreement to set up and maintain a payment schedule, produce billing entries, and track receipt of payments.

See Also

lssf, Setting Up Payment Plans

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Linking Students to Deferral Contracts

When you link a student to deferral contracts, you specify certain parameters that are specific to the student you are linking.

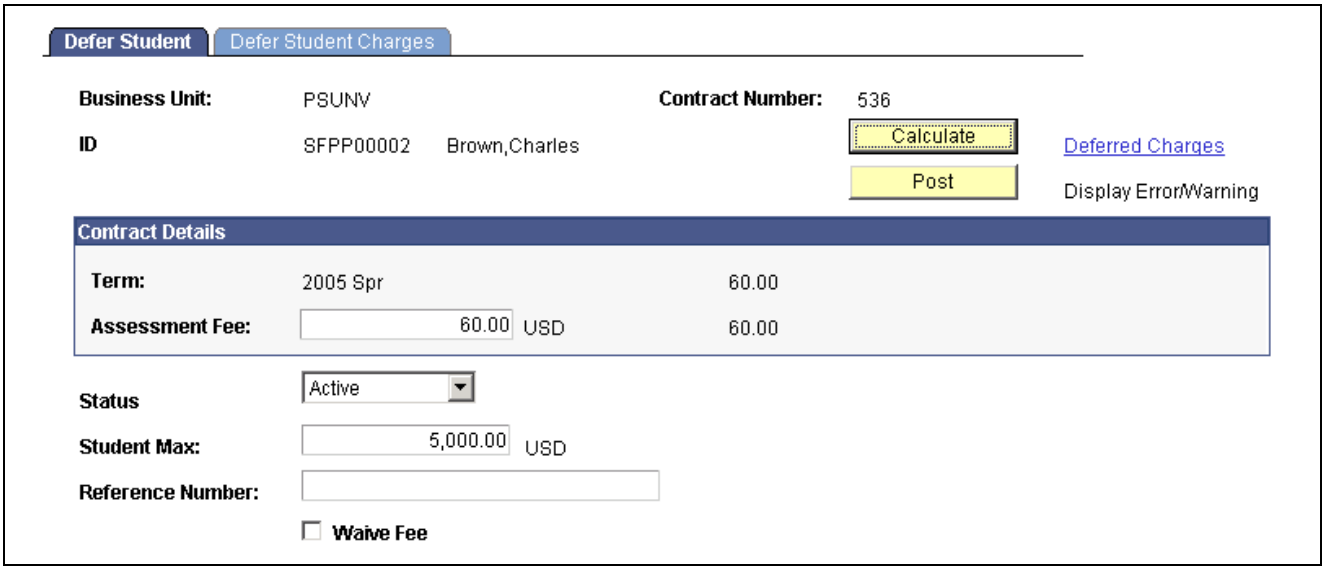
This section discusses how to define student-specific details for a deferral contract.

Pages Used to Link Students to Deferral Contracts

Page Name	Definition Name	Navigation	Usage
Defer Student	DEFER_STUDENT	Student Financials, Payment Plans, Payment Plan, Assign Deferral Contract, Defer Student	Define student-specific details for a deferral contract.
Deferred Charges	ITEM_LINE_DEFER_SP	Click the Deferred Charges link on the Student Defer page.	View all active charges in the student's account and confirm that eligible charges have been deferred to the correct due date.
Defer Student Charges	DEFER_STDNT_LINE	Student Financials, Payment Plans, Payment Plan, Assign Deferral Contract, Defer Student Charges	Confirm the deferral contract calculation results.

Defining Student-Specific Details for a Deferral Contract

Access the Defer Student page (Student Financials, Payment Plans, Payment Plan, Assign Deferral Contract, Defer Student).



Defer Student page

Calculate Click to calculate charges to be deferred. After calculating the contract but before posting it, look at the Defer Student Charges page to confirm which charges the system selected for deferral.

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Post	Click to defer charges.
Deferred Charges	After posting, click to confirm that the charges have been deferred to the correct dates.
Display Errors/Warnings	Click to see errors and warning messages.
Assessment Fee	The default amount in this field is the fee that you specified during the setup of the deferral contract. Use this field to override the default amount.
Student Max (student maximum)	The default value for this field is the maximum amount that you specified during the setup of the deferral contract. You can override this amount.
Waive Fee	Select to waive the student's assessment fee.

Administering Payment Plan Contracts

This section discusses how to:

- Confirm and modify payment plan contract parameters for an individual student.
- Confirm and modify additional payment plan contract parameters for an individual student.
- Recalculate payment plan contracts.

Pages Used to Administer Payment Plan Contracts

Page Name	Definition Name	Navigation	Usage
Payment Plan 1	PAY_PLAN_SF_1	Student Financials, Payment Plans, Payment Plan, Assign, Payment Plan 1	Confirm and modify payment plan contract parameters for an individual student.
Payment Plan 2	PAY_PLAN_SF	Student Financials, Payment Plans, Payment Plan, Assign, Payment Plan 2	Confirm and modify additional payment plan contract parameters for an individual student.
Payment Distribution	TP_PPLN_QCK_POST	Student Financials, Payment Plans, Payment Plan, Assign, Payment Distribution	Review the payment schedule, charge amounts, billing dates, and due dates for the payment plan. You can adjust the billing dates and installment amounts on this page.
Recalc Payment Plan	RUNCTL_PMTPLNRECAL	Student Financials, Payment Plans, Payment Plan, Assign and Recalc, Recalc Payment Plan	Recalculate payment plan contracts.

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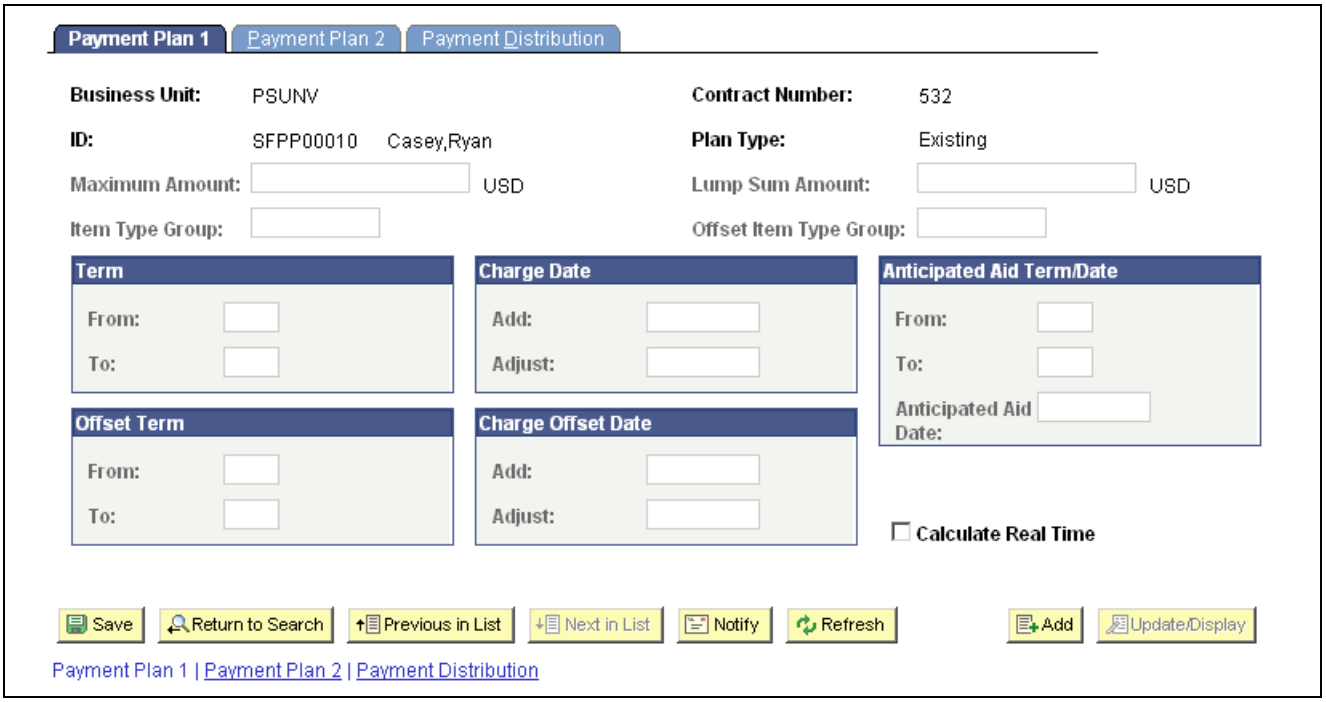
Confirming and Modifying Payment Plan Contract Parameters for an Individual Student

Access the Payment Plan 1 page (Student Financials, Payment Plans, Payment Plan, Assign, Payment Plan 1).



Payment Plan 1 page

All of the values that appear in the fields on this page are default values from the contract setup pages. You can override values in any fields that are available, but you cannot exceed the limits established when you set up the contract. Not all fields are available with all types of contracts.

See Also

lssf, Setting Up Payment Plans, Setting Up Payment Plan Contracts

Confirming and Modifying Additional Payment Plan Contract Parameters for an Individual Student

Access the Payment Plan 2 page (Student Financials, Payment Plans, Payment Plan, Assign, Payment Plan 2).

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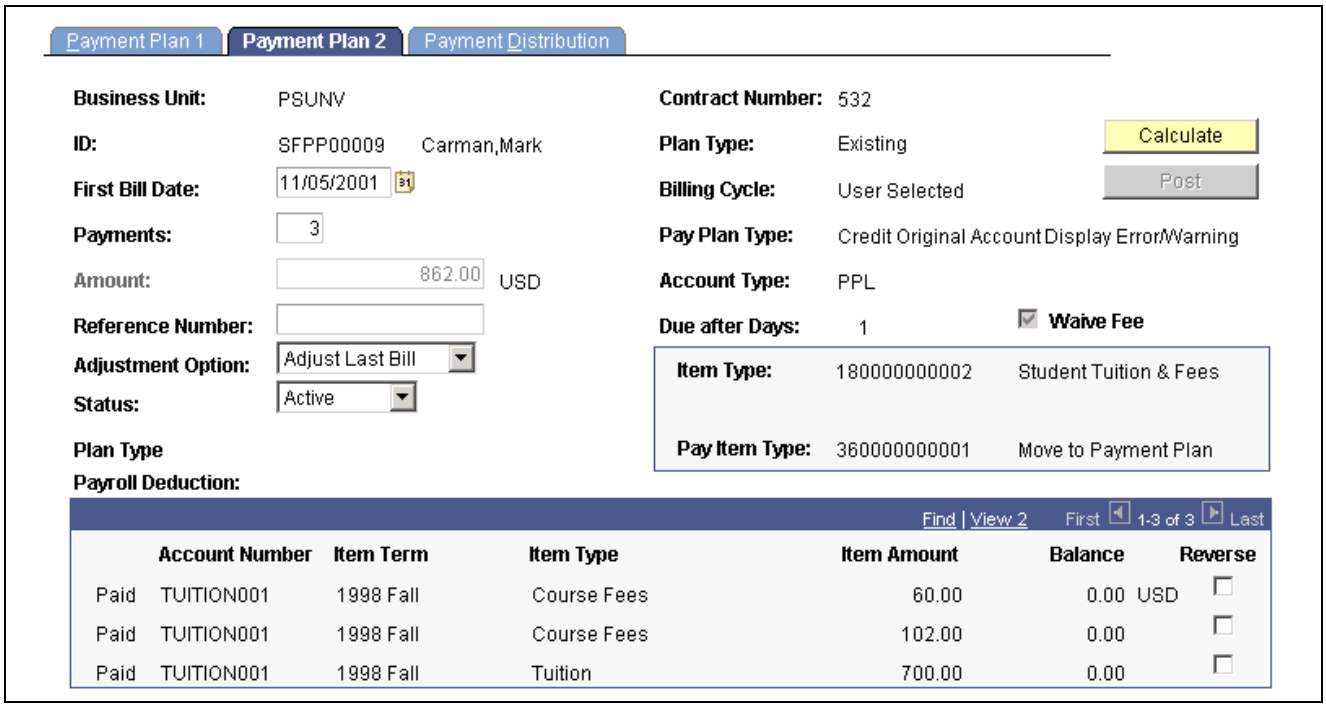

Payment Plan 2 page

First Bill Date, Payments, and **Adjustment Option**

The values that appear in each of these fields are set by default from the payment plan contract setup. You can override these values.

Status

The value that appears in this field is set by default from the payment plan contract setup. You can override this value to make the student *Active*, *Inactive*, or *Cancelled*. After you set the student status to *Cancelled*, you can later reactivate the payment plan contract for the student by changing the student status back to *Active*.

For calculated payment plan contracts, the system distributes the charges equally across all unbilled installments, regardless of the selected adjustment option, when you reactivate a calculated payment plan contract for a student. Subsequent adjustments to a reactivated plan follow the rules of the plan's adjustment option.

For both calculated and existing payment plan contracts, the system charges any designated assessment fee upon reactivation.

For existing payment plan contracts, the system allows additional charges for students with a status of *Active* if the associated contract has a status of *Inactive*.

Plan Type, Billing Cycle, Pay Plan Type, Account Type, Due after Days, Item Type, and **Pay Item Type**

The values that appear in each of these fields are set by default from the payment plan contract setup. The values are for information only and cannot be changed.

Amount

For calculated and lump sum payment plans, the value that appears in this field is set by default from the Maximum Amount field or the Lump Sum Amount field, respectively, on the Payment Plan 1 page. For the existing type payment plans, the value of the selected charges after calculation appears in this field.

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Waive Fee If an administrative fee was initially defined in the payment plan setup, then you can waive the fee. Select this check box if you want to waive the fee for individual students.

Eligible Charges

When you add a student to an existing type payment plan, all eligible charges appear at the bottom of the page. Select one or more charges to include in the payment plan.

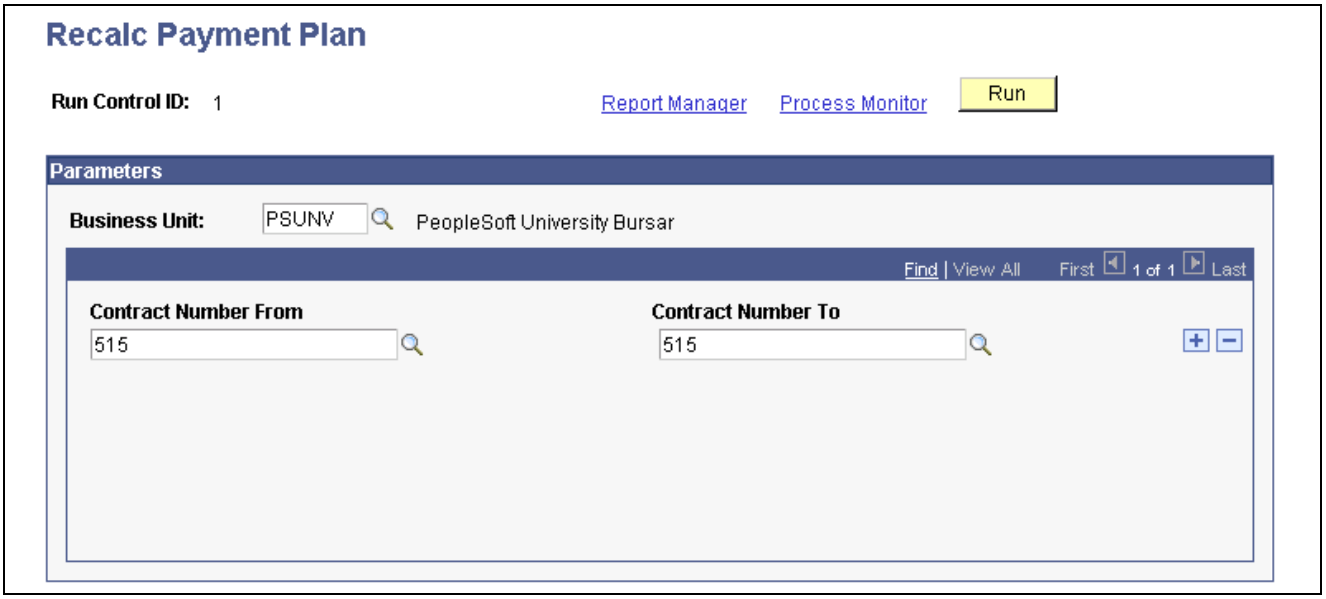
Calculate Click to create the payment plan agreement. The payment plan agreement consists of all scheduled payments and plan fees. This button is unavailable if the student status is *Inactive.*

After you click this button, you can review and adjust billing dates and installment amounts on the Payment Distribution page.

Post Click to post each of the scheduled payments and plan fees to the student's account.

Recalculating Payment Plan Contracts

Access the Recalc Payment Plan page (Student Financials, Payment Plans, Payment Plan, Assign and Recalc, Recalc Payment Plan).



Recalc Payment Plan page

Contract Number From and **Contract Number To** Enter contract numbers. You can recalculate one contract or a range of contracts. To calculate just one, enter the same number in both fields. To recalculate a range of contracts, enter the first and last contract numbers in the range.

You should recalculate payment plan contracts on a regular basis until the adjustment date has passed so that your payment plan balances are up-to-date and reflect adjustments to the student's charges.

Note. The Payment Plan Recalculation (SFPPLNCL) process recalculates only payment plans of the calculated type.

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Administering Third-Party Contracts

This section discusses how to:

- Link students to third-party contracts.
- Enter additional student contract details
- Recalculate third-party contracts.
- Roll over third-party contracts and initiate student assignment.
- Review contract group summary.
- Review student contract group summary.

Page Used to Administer Third-Party Contracts

Page Name	Definition Name	Navigation	Usage
Assign Students to Third Party	TP_STUDENT	Student Financials, Payment Plans, Third Party Contract, Assign, Assign Students to Third Party	Assign students to third-party contracts.
Student Contract Details	SSF_TP_STDNT_DTL	Click the Additional Details link on the Assign Students to Third Party page.	Enter any additional information for the student's contract.
Recalc Third Party Contracts (recalculate third-party contracts)	RUNCTL_TPRECAL	Student Financials, Payment Plans, Third Party Contract, Assign and ReCalc, Recalc Third Party Contracts	Recalculate third-party contracts.
Rollover Third Party Contracts	SSF_RUNCTL_TPCROLL	Student Financials, Payment Plans, Third Party Contract, Rollover Contracts, Rollover Third Party Contracts	Roll over contracts from one term to another. In addition, you can initiate the process to roll over students assigned to the contracts.
Contract Reference Details	SSF_TPSTG_CON_REF	Click the Reference Details link on the Rollover Third Party Contracts page.	Enter any additional information for the new contract that the rollover process will create.
Third Party Group Summary	SSF_TPC_GROUP_SUMM	Student Financials, Payment Plans, Third Party Contract, Contract Groups, Contract Group Summary, Contract Group Summary	Display summary information regarding contracts within a contract group.
Student Contract Group Summary	SSF_STD_TPC_GRP	Student Financials, Payment Plans, Third Party Contract, Contract Groups, Student Contract Group Summary, Student Contract Group Summary	Display summary information regarding a student within a contract group.

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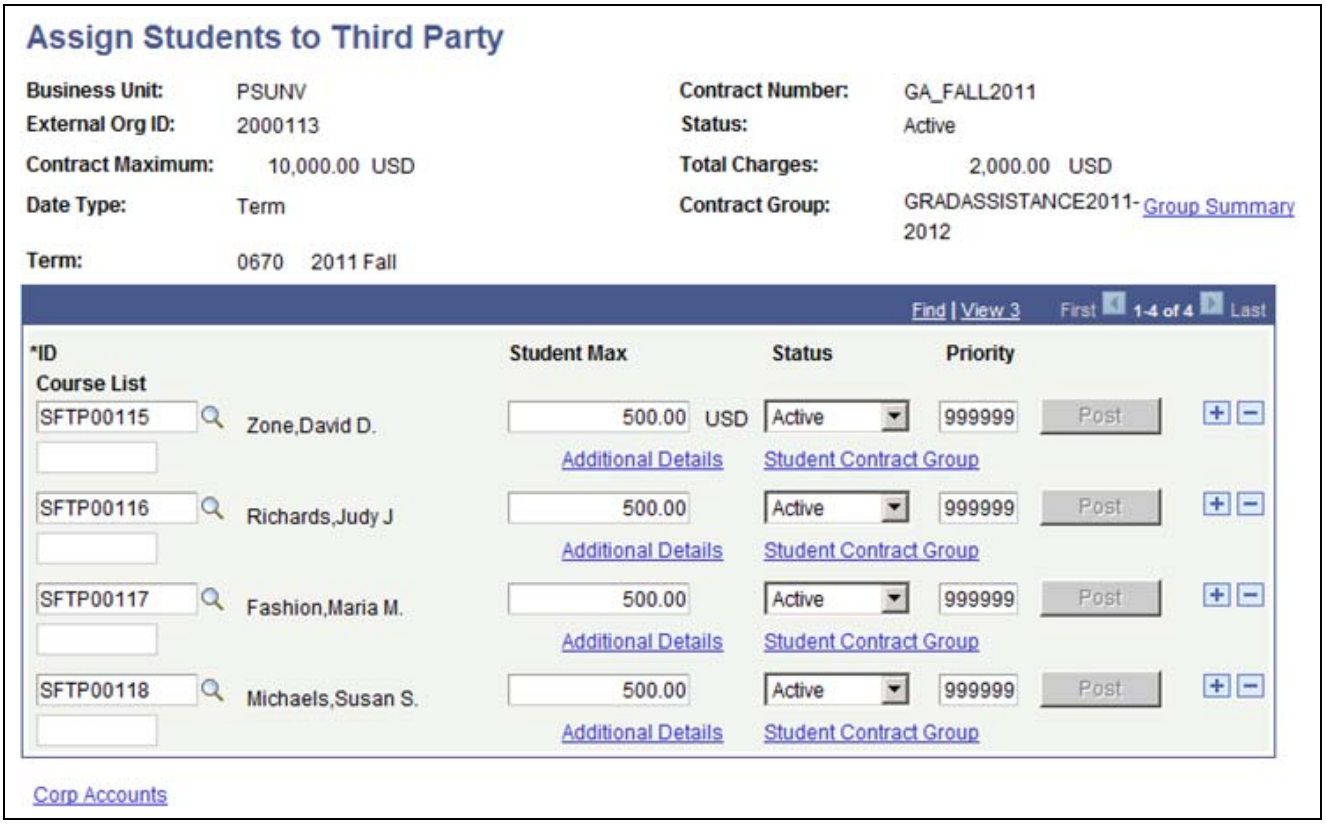
Linking Students to Third-Party Contracts

Access the Assign Students to Third Party page (Student Financials, Payment Plans, Third Party Contract, Assign, Assign Students to Third Party).



Assign Students to Third Party page

The third-party contract course list

Total Charges	Displays the total amount linked to the sponsor.
Contract Group	Displays the Third Party Contract Group to which this contract has been linked.
Group Summary	Click to access the Contract Group Summary component.
ID	Enter the ID of the student that you are linking to the third-party contract.
Student Max (student maximum)	The amount that you specified during the third-party contract setup appears by default in this field. You can decrease the amount.
Priority	If a student is linked to more than one third-party contract, you may want the contracts to apply in a preferred order. Enter a priority value to determine the order in which the contracts apply. The default priority value is *999999*. The lower the number, the higher the priority.
Course List	Confirm the default course list that is attached to the third-party contract or override the selection with a different list. If you override the default selection, the list applies only to the individual student being linked to the contract. If the contract was not set up with the Specific Course List option, it cannot be added on this page.

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Note. To use a course list with a third-party contract, you must consider the setup issues that are related to term fees.

Bundle 30. Added information about tuition calculation installments and how they affect third party course list contracts.

The course list uses the FEE_CLASS_PRICE record for the class fee and applies the third-party contract percentage to the class fee, which is then applied to each ITEM_SF installment. If the third-party contract is set up as a course list, the ITEM_SF installment number is not equal to zero, and class number is not blank, a warning message is recorded in the tuition calculation log: *Term Fee Calc by Term or Session is not covered.* When the term fees are divided by ITEM_SF installment, third party course list contracts cannot cover term fees calculated by term or session.

See PeopleSoft Student Financials 9.0 PeopleBook, Calculating Tuition and Fees, Using ITEM_SF Installments.

Additional Details	Click to access the Student Contract Details page, where you can enter additional information for the student contract.
Student Contract Group	Click to access the Student Contract Group Summary component.
Post	Click to link the student to the third-party contract.
Find	Click to access the Explorer User prompt. Use the Explorer User prompt to enter a student's ID to quickly locate his or her record in the third-party contract.
Corp Accounts (corporation accounts)	Click to access the Corp Accounts page, where you can review account details for the sponsor of this third-party contract.

Note. The Assign Students to Third Party page displays additional fields based on the date type of the contract. For example, if the Date Type field value is *Term*, the page displays the Term field with the term value and description.

See Also

lssf, Setting Up Fees and Tuition Groups, Setting Up Course List Fees

lssf, Setting Up Fees and Tuition Groups, Setting Up Term Fee Codes

[PeopleSoft Enterprise Student Financials 9.0 PeopleBook]Reviewing Contract Group Summary

[PeopleSoft Enterprise Student Financials 9.0 PeopleBook]Setting Up Third Party Contract Groups

[PeopleSoft Enterprise Student Financials 9.0 PeopleBook]Reviewing Student Contract Group Summary

Entering Additional Student Contract Details

Access the Student Contract Details page (Click the Additional Details link on the Assign Students to Third Party page).

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Student Contract Details page

User Defined 1 – 5

Enter any additional details related to the student contract.

Many sponsors have specific information that pertains to each student. This information is required on the sponsor's invoice for requesting payment. The five additional student contract fields (User Defined 1 – 5) enable you to enter information that is specific to each student. The corporate XML invoice process picks up this information.

Recalculating Third-Party Contracts

Access the Recalc Third Party Contracts page (Student Financials, Payment Plans, Third Party Contract, Assign and ReCalc, Recalc Third Party Contracts).

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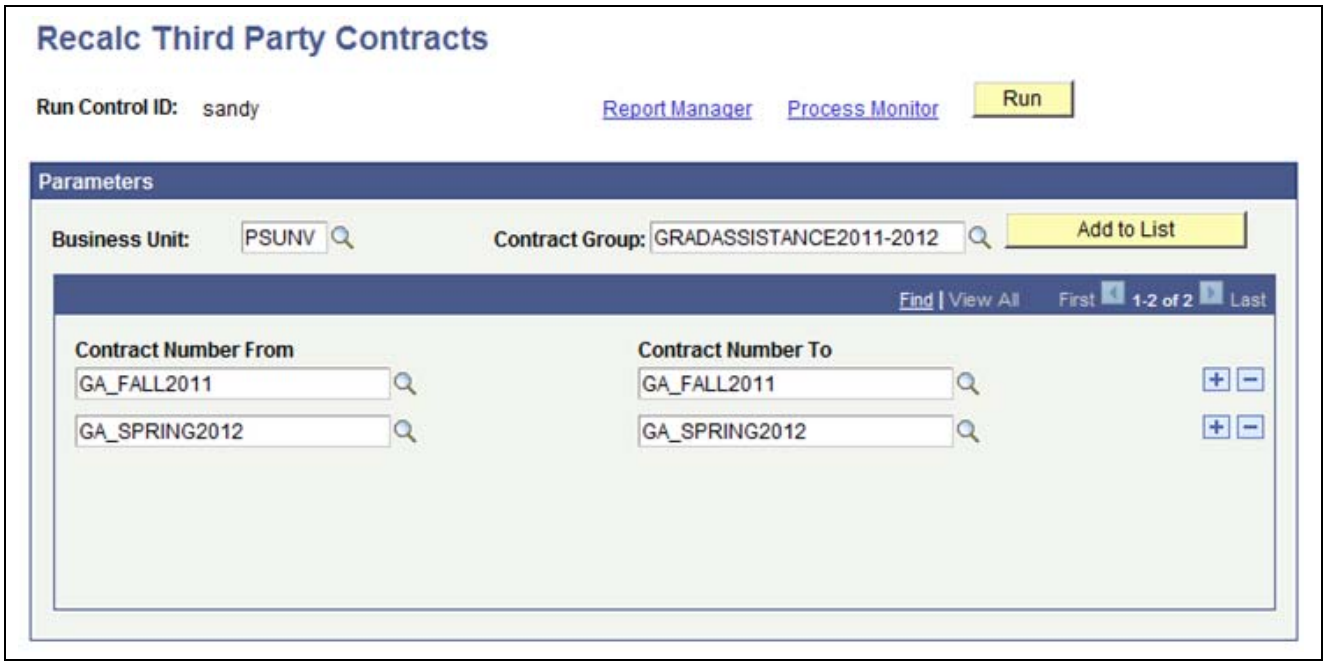

Recalc Third Party Contracts page

Contract Group	Select the Third Party Contract Group to which the contract(s) have been linked.
Add to List	After you select a Contract Group, click the Add to List button—the contracts associated with the Contract Group will be displayed.
Contract Number From and **Contract Number To**	You can recalculate one contract or several contracts in a range. To recalculate only one contract, enter the contract number in the Contract Number From field. The same number appears in the Contract Number To field by default. To recalculate a range of contracts, enter the first contract number of the range in the Contract Number From field and the last in the range in the Contract Number To field.

You should periodically use the Third Party Recalculation (SFPTPPRC) process to recalculate third-party contracts until the end of the adjustment period for third-party contracts (last date, as established on the Third Party Contract setup page) to make sure all adjustments to charges are recognized.

Note. Once the last date has expired, any reductions to covered charges will reduce the third-party credit and the third-party charge on the student and corporate accounts.

For information about how the Third Party Recalculation process is invoked during the Process Node Change Request (SFPTPREQ.CBL) process:

See: Setting Up Payment Plans, Creating and Processing Third-Party Contract Change Requests

Rolling Over Third-Party Contracts and Initiating Student Assignment

Access the Rollover Third Party Contracts page (Student Financials, Payment Plans, Third Party Contract, Rollover Contracts, Rollover Third Party Contracts).

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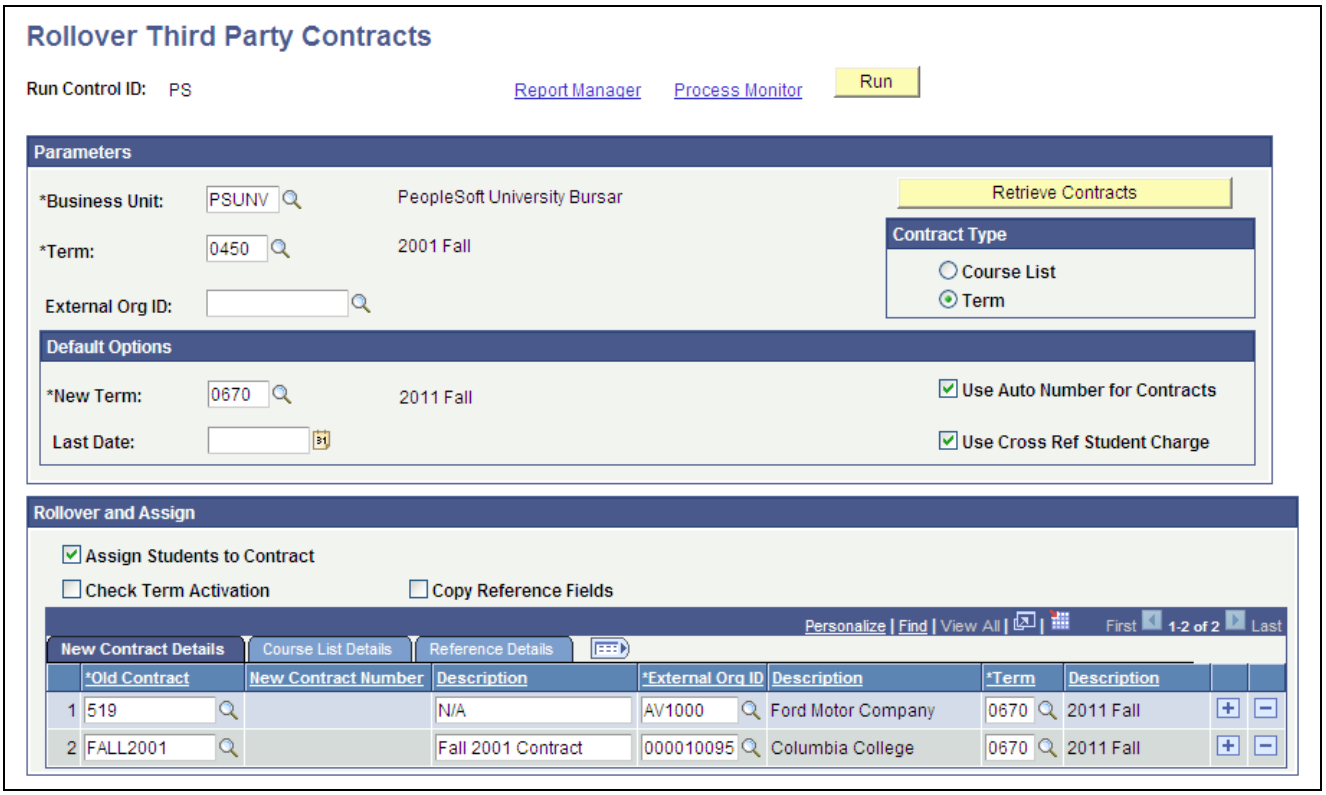

Rollover Third Party Contracts page

To roll over third-party contracts from one term to another:

1. Enter the business unit, term, and optionally the external org ID for which contracts need to be rolled over.
2. Enter the new term to which you want to roll over the contracts.
3. Enter the last date for the new contracts that the rollover process will create.
4. Click the Retrieve Contracts button to retrieve the contract details. The grid (that contains the New Contract Details, Course List Details and Reference Details tabs) displays the retrieved details of the contracts that you want to roll over. Review or edit this retrieved information and enter additional information that you want to copy to the new contracts, such as new contract numbers and course lists.
5. Select the options that you want the process to use, such as whether to assign students from old contracts to new contracts.
6. Click Run to start the Third Party Contracts Rollover Application Engine process (SSF_TPROLOVR). The process will roll over contracts and initiate student assignments based on the options selected on the Rollover Third Party Contracts page. The process rolls over the contract data into the production tables and rolls over the student assignment data into a staging table (SSF_TP_CONT_SEL).
7. Use the Third Party Contract setup page to review the contracts that the rollover process has created (Student Financials, Payment Plans, Create Third Party Contract, Create).
8. If you selected the Assign Students To Contract option on the Rollover Third Party Contracts page, use the Review Results by Contract page to view or update the student data that the rollover process assigned to the new contracts. The student assignment data that you can view or update on this Review Results by Contract page is stored in a staging table (SSF_TP_CONT_SEL).
9. Run the Third Party Batch Assignment COBOL process (SFPTPDRV) (Student Financials, Payment Plans, Third Party Contract, Assign and ReCalc, Recalc Third Party Contracts) to move the student assignment data from the staging table to the third-party contracts production tables. After the Third

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Party Batch Assignment process finishes successfully, you can view or update the assignments on the Assign Students to Third Party page.

Suppose you choose to roll over contracts without initiating student assignments. In such a case, after running the rollover process, you can use the Mass Contract Select page to assign a batch of students to the new contracts or you can use the Assign Students to Third Party page to individually assign each student to a new contract.

Parameters and Default Options

Business Unit

Enter the business unit for which contracts need to be rolled over.

Term

Enter a term for which the page should retrieve the contracts.

The system prompts you with only those terms that have contracts for the entered business unit.

External Org ID

Optionally, enter the contract sponsor's ID for which the page should retrieve the contracts. Also, the system uses this ID as a default for the new contracts that the rollover process creates.

The system prompts you with only those IDs for which a term contract exists.

Contract Type

By default, the system selects the Term option.

Select the Term option to retrieve term contracts.

Select the Course List option to retrieve course list contracts.

New Term

Enter a target term to which the rollover process copies the new contracts.

Last Date

Enter the last date that new charges can be covered or new students can be assigned. The system will use this value as a default for the new contracts that the rollover process creates.

Once the last date has expired, reduction to covered charges will reduce the third-party credit and the third-party charge on the corporate account.

This is a required field.

Retrieve Contracts

The system enables this button only after you have entered values in the Business Unit, Term, and New Term fields.

When you click the button, the system first searches for the contracts based on the business unit, term, external org ID, and contract type that you have specified. Then, the system populates the results in the grid of the Rollover and Assign group box.

For example, suppose you have entered Business Unit = *PSUNV,* Term = *0450,* External Org ID = *SF9000,* and Contract Type = *Term.* When you click the button, the grid displays all active term contracts for PSUNV in term 0450 and for sponsor SF9000.

Use Auto Number for Contracts

Select to have the rollover process automatically assign a contract number to the new contracts.

You can select this check box only if auto numbering is enabled on the Counters page (Set Up SACR, Product Related, Student Financials, SF Business Unit, Counters).

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If you select this check box, the New Contract Number field on the New Contracts Details tab is unavailable for entry.

Use Cross Ref Student Charge

Select this check box to set this flag on the new contracts. If cleared, the check box value from the original contract is copied to the new contract.

This check box corresponds to the Cross Reference Student Charge check box on the Third Party Contracts page.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook]Setting Up Third-Party Contracts .

Rollover and Assign

Assign Students to Contract

Select to initiate student assignments from the source contract to the new contract.

If you select this check box, the Check Term Activation and Copy Reference Fields check boxes become available.

Check Term Activation

Select to validate whether the student is term activated in the new term before the rollover process assigns the student to the new contract.

Copy Reference Fields

Select to copy the user-defined data set up on the Student Contract Details page to the new contracts.

New Contract Details

Old Contract

Displays the retrieved contract number. This is the source contract that the rollover process will use as a basis to create a new contract.

New Contract Number

Enter the contract number for the new contract that the rollover process will create.

If you have selected the Use Auto Number for Contracts check box, this field becomes unavailable for entry.

External Org ID

Enter the ID for the contract sponsor.

Note. If you change this value the Contract Group details will not be rolled over to new contract.

Term

Enter the academic term for the new contract.

Course List Details

Use this tab to view or enter the course lists for the new course list contracts. You can enter a course list for a new contract if you have selected the Course List option on this page.

Course List

Enter the course list for the new contract. This course list applies to all students who are assigned to the new contract. If necessary, you can override a course list at the student level on the Review Results by Contract page.

This field is available if you have selected the Course List option on the Contract Type group box.

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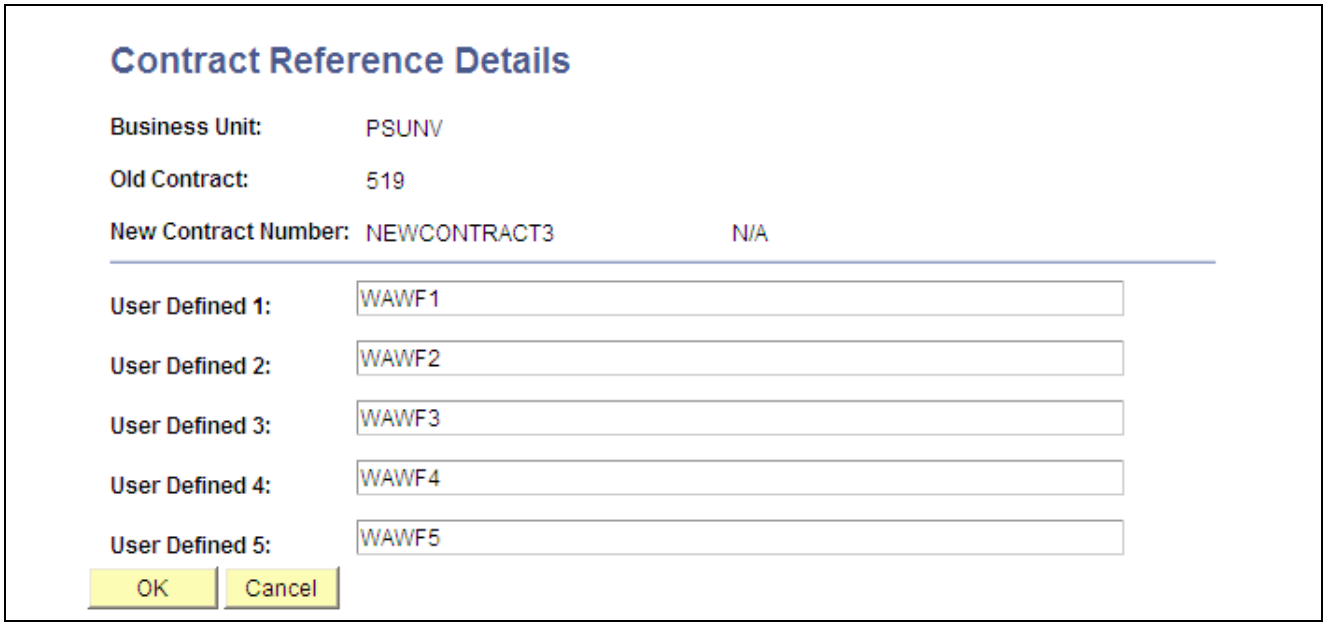
Reference Details

Use this tab to review or enter additional details for the new contract.

User Defined 1–2 Enter any additional details for the new contract.

Reference Details Click to access the Contract Reference Details page where you can enter additional details for the new contract.

The following is an example of the Contract Reference Details page.



Contract Reference Details page

Use the User Defined 1–5 fields to enter any additional details for the new contract.

Rollover Processing

You can run the Third Party Contracts Rollover process in two ways based on the options you select on the Rollover Third Party Contracts page:

1. Roll over contracts without initiating student assignments.
2. Roll over contracts and initiate student assignments.

The Retrieve Contracts button retrieves only *Active* and non-expired third-party contracts for the specified criteria.

The rollover process rolls over only those contracts that appear in the grid. You can add or remove contracts from the grid. Only active and non-expired contracts can be added to the grid. Also, only term or course list contracts can be added to the grid, depending on the contract type that you select.

Note. The Third Party Contracts Rollover process can roll over only term and course list contracts.

For the *Roll over contracts without initiating student assignments* method, the process performs the following actions:

- Because you did not select the Assign Students to Contract check box, the process rolls over only the contract.

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- The new contract uses default values from the old contract if you did not change the data in the grid.

  Other data setup on the old contract is also rolled over to the new contract.
- The process checks to see if overlapping nodes exist in the old contract—if so, the new contract is not created and an appropriate message is logged.
- The process copies only nodes that have an *Active* status. All item type exclusions are also rolled over to the new contract.
- The process assigns all new contracts a status of *Active.*
- Audit trail is inserted into the related tables—TP_CONTRACT, TP_CHARGES, and SSF_TPC_CHGEXCL.

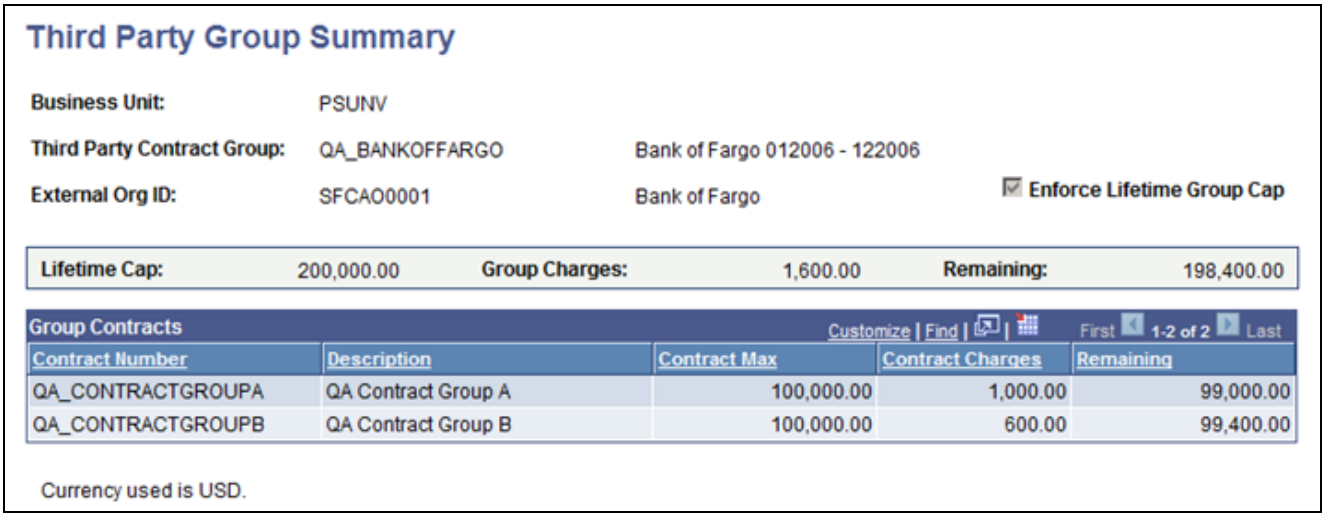
For the *Roll over contracts and initiate student assignments* method, the process performs the following actions:

- In this method you select the Assign Students to Contract check box, therefore, the process rolls over the contract along with initiating the student assignments. Note that the ID assignment status should be *Active* on the Assign Students to Third Party page for the old contract. For example, if the status is *Hold* or *Cancelled*, the student is not copied to the new contract.

  The student also should not have a service impact matching the one set up on the contract. For example, if the contract has service impact NOPPL set up and the student also has the same NOPPL service impact attached, the student is not copied to the new contract.
- The process inserts the student assignment data into the staging table (SSF_TP_CONT_SEL).
- The process copies all existing defaults from the current assignment to the new one.
- The process sets the new assignment status to *Active.*
- If you select the Check Term Activation check box, the process assigns students to the new contract only if the student is term activated in the new term.
- If you select the Copy Reference Fields check box, the process copies the user-defined field values from the Assign Students to Third Party and Student Contract Details pages to the new assignment.

Reviewing Contract Group Summary

Access the Third Party Group Summary page (Student Financials, Payment Plans, Third Party Contract, Contract Groups, Contract Group Summary, Contract Group Summary).



Third Party Group Summary page

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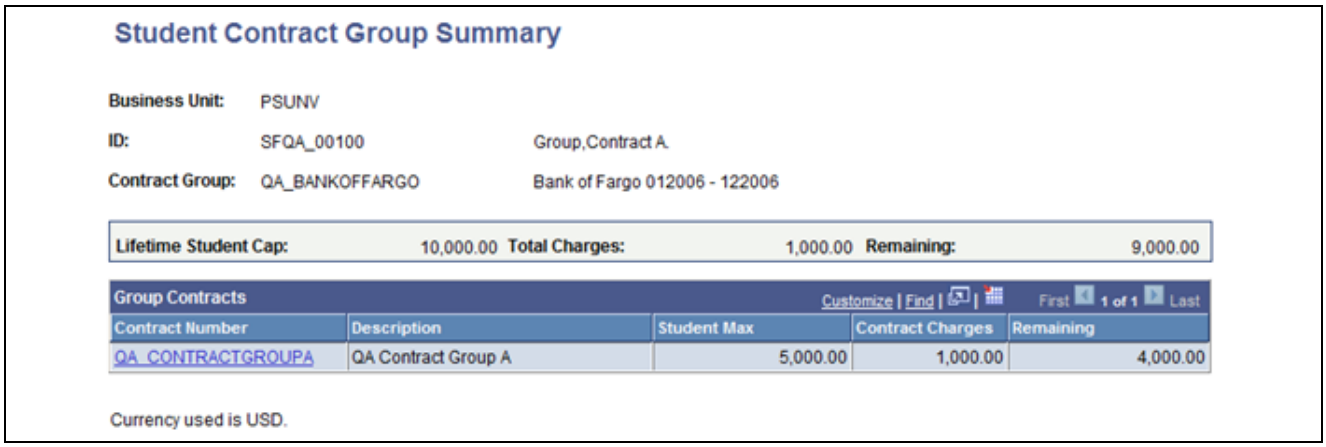
The Third Party Group Summary page provides an inquiry view at the Contract level. All contracts linked to the Contract Group will be listed along with the Lifetime Cap amount, charges that have been linked to the Contract Group, and the amount remaining to allow additional eligible charges.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook]Setting Up Third Party Contract Groups.

Reviewing Student Contract Group Summary

Access the Student Contract Group Summary page (Student Financials, Payment Plans, Third Party Contract, Contract Groups, Student Contract Group Summary, Student Contract Group Summary).



Student Contract Group Summary page

The Student Contract Group Summary page provides an inquiry view at the student level. The page displays the Lifetime Student Cap or shows that a student is associated to a Lifetime Student Override. A link is provided for each contract with which the student is associated. Click the link to access the Assign Students to Third Party page.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook]Setting Up Third Party Contract Groups.

Enrolling Multiple Students in a Payment Plan or Third-Party Contract

This section discusses how to:

- Define enrollment for multiple students in a payment plan or third-party contract.
- Review results by contract.
- Process mass contract assignments.
- Process mass cancellations.
- Use inquire contract assignments.

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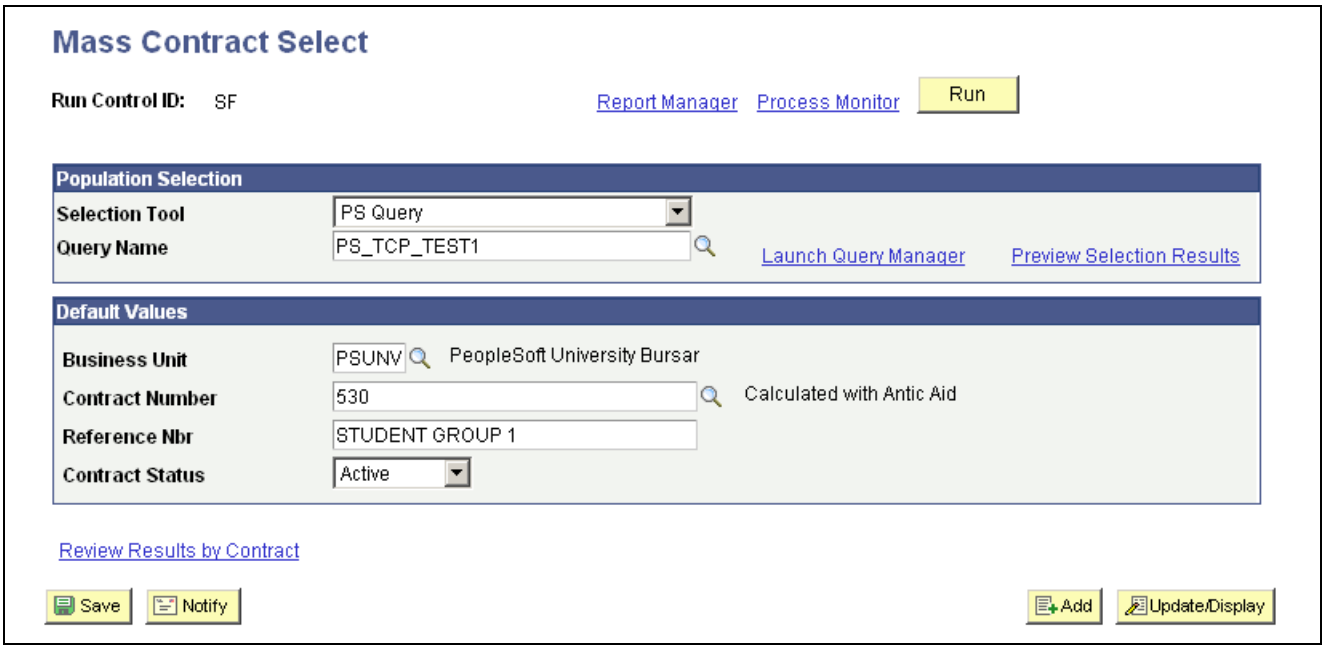
Pages Used to Enroll Multiple Students in a Payment Plan or Third-Party Contract

Page Name	Definition Name	Navigation	Usage
Mass Contract Select	SSF_RUNCTL_PS_TPC	Student Financials, Payment Plans, Mass Contract Select	Define enrollment for multiple students.
Review Results by Contract	SSF_PS_PPL_REVIEW	Student Financials, Payment Plans, Payment Plan, Review Results by Contract Student Financials, Payment Plans, Third Party Contract, Review Results by Contract	View results by contract for payment plans and for third-party contracts.
Recalc Payment Plan	RUNCTL_PMTPLNRECAL	Student Financials, Payment Plans, Payment Plan, Assign and Recalc, Recalc Payment Plan	Link students to or cancel a student's link to a payment plan.
Recalc Third Party Contracts (recalculate third-party contracts)	RUNCTL_TPRECAL	Student Financials, Payment Plans, Third Party Contract, Assign and ReCalc, Recalc Third Party Contracts	Recalculate third-party contracts.
Inquire Contract Assignments	SSF_TP_PPL_INQUIRY	Student Financials, Payment Plans, Payment Plan, Inquire Contract Assignments	View all students linked to a payment plan.

Defining Enrollment for Multiple Students

Access the Mass Contract Select page (Student Financials, Payment Plans, Mass Contract Select).



Mass Contract Select page

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Use this page to run a predefined query, run an equation engine, or load a flat file to identify the population for a specific contract. Also define initial default values that will be associated with each employee ID. When you run this process, the SSF_TP_CONT_SEL staging table is populated. The data is then deleted from the staging table when the Batch Assignment (SFPSTDRV) process is run.

See [Administering Payment Plans]Processing Mass Contract Assignments.

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.

Click the Run button to run the query and populate a staging table with the selected employee IDs and the default values. A log file will contain all records that did not populate the staging table because of a service impact or because the student is already associated with the contract number.

See [PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook - Update 1]Using the Population Selection Process.

Population Selection

Selection Tool	Select *PS Query, Equation Engine*, or an external file.
Query Name	Enter the appropriate query.

Default Values

Contract Number	Enter the appropriate contract number.
Reference Nbr (reference number)	Provide a reference number. This field is optional.
Contract Status	Select a status of *Active* or *Cancel*.

Click the Review Results by Contract link to view the results of the query along with the default values.

Reviewing Results by Contract

The Review Results by Contract page will vary depending on the type of contract selected.

Review Results by Contract for a Payment Plan

Access the Review Results by Contract page (Student Financials, Payment Plans, Payment Plan, Review Results by Contract).

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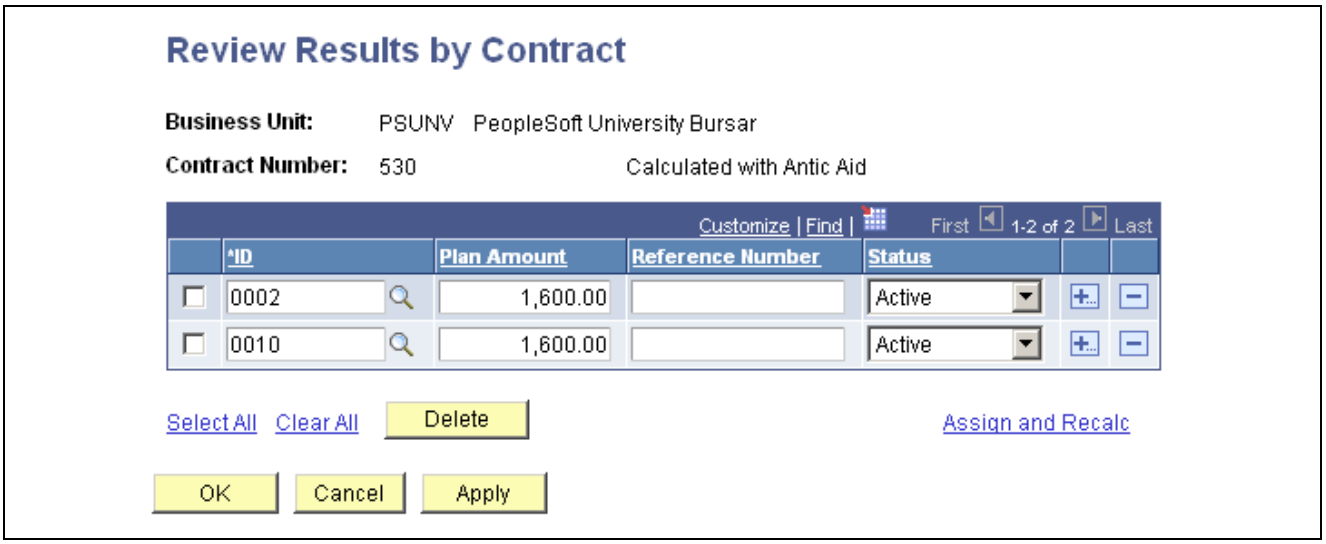

Review Results by Contract page for payment plans

The Mass Contract Select process populates a staging table and the Review Results by Contract page displays the information. You can also populate Review Results by Contract by entering data on the page. When you initially access the page, one row is populated with default values, but the ID field is blank. Enter the ID.

When you use this page to enter data, the SSF_TP_CONT_SEL staging table is populated. Once you run the Batch Assignment (SFPSTDRV) process to move the student assignment data from the staging table to the production table, the data is deleted from the staging table.

For the initial assignment of a student to a payment plan, you can also update the Plan Amount, Reference Number, and Status fields. After the student has been linked to the payment plan, you should do any updates through the payment plan assign pages. You can use the Review Results by Contract page to change the specified emplid status to Cancelled. After you run the assign contracts process to move the student assignment data from staging to production tables, you should use the Payment Plan 2 page to update the Plan Amount, Reference Number, and Status fields.

Click the Add (+) button to enter the number of rows desired for additional data entry.

After clicking Apply, delete individual rows or use the Select All button to select all rows and then click Delete. This action removes the rows from the staging table. The Clear All link removes all the Select flags, if needed.

After entering the necessary data in all rows, click Apply.

See [Administering Payment Plans]Processing Mass Contract Assignments.

Review Results by Contract for a Third-Party Contract

Access the Review Results by Contract page (Student Financials, Payment Plans, Third Party Contract, Review Results by Contract).

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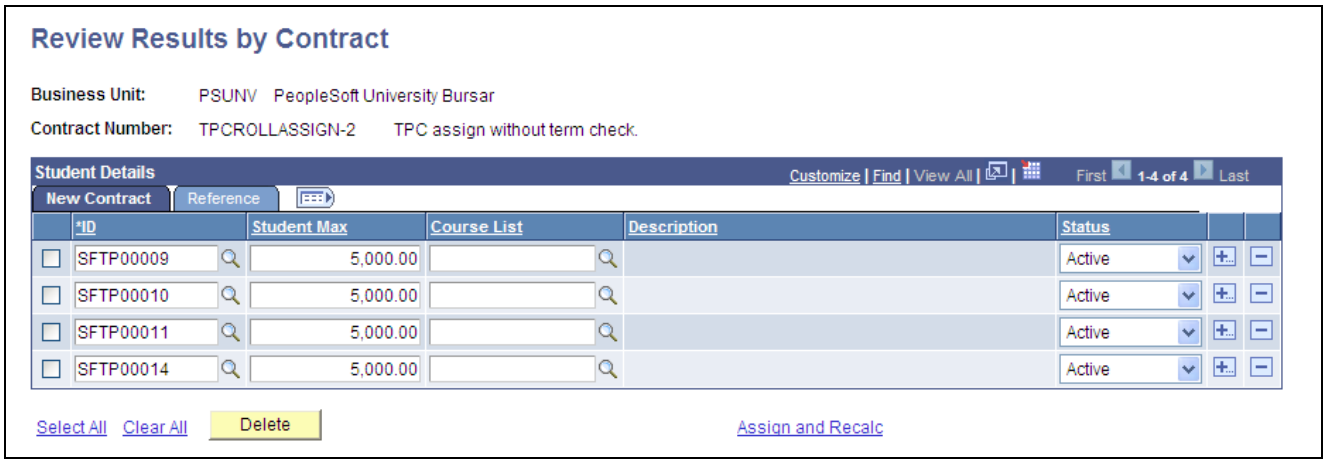

Review Results by Contract page for third-party contracts

The Review Results by Contract page for third-party contracts is similar to that used for payment plan, except that the New Contract and Reference tabs do not exist on the payment plan page.

The New Contract tab contains details similar to that used for payment plan, except that the New Contract tab has a Student Max column that replaces the Plan Amount column on the Payment Plan page and an additional Course List column.

The Reference tab contains the Reference Number and User-Defined 1–5 fields. You can use the user-defined fields to record additional information related to each student.

After the initial assignment of a student to a third-party contract, you can also update the User Defined 1–5, Student Max, Course List, and Reference Number fields using this page. After the student has been linked to the third-party contract, updates should be done through the Assign Students to Third Party page. For example, the Third Party Contracts Rollover process can assign students to the new contract. After this initial assignment, you can use the Review Results by Contract page to update User Defined 1–5, Student Max, Course List, and Reference Number fields. However, after you run the assign contracts process to move the student assignment data from staging to production tables, you should use the Assign Students to Third Party page to update the User Defined 1–5, Student Max, Course List, and Reference Number fields.

Processing Mass Contract Assignments

Use this batch process to link students to a contract.

You can link students to a contract or cancel students from a contract. A contract from and to range is used to identify contracts for processing. The process scheduler contains two processes, one for assigning students to a contract and another for recalculating a contract. After the assign contract process finishes successfully, the respective records in the staging table are deleted. Use the assign contract process to either activate or cancel your selected population from the contract.

Access the Recalc Payment Plan page, if you want to link students to a payment plan (Student Financials, Payment Plans, Payment Plan, Assign and Recalc, Recalc Payment Plan).

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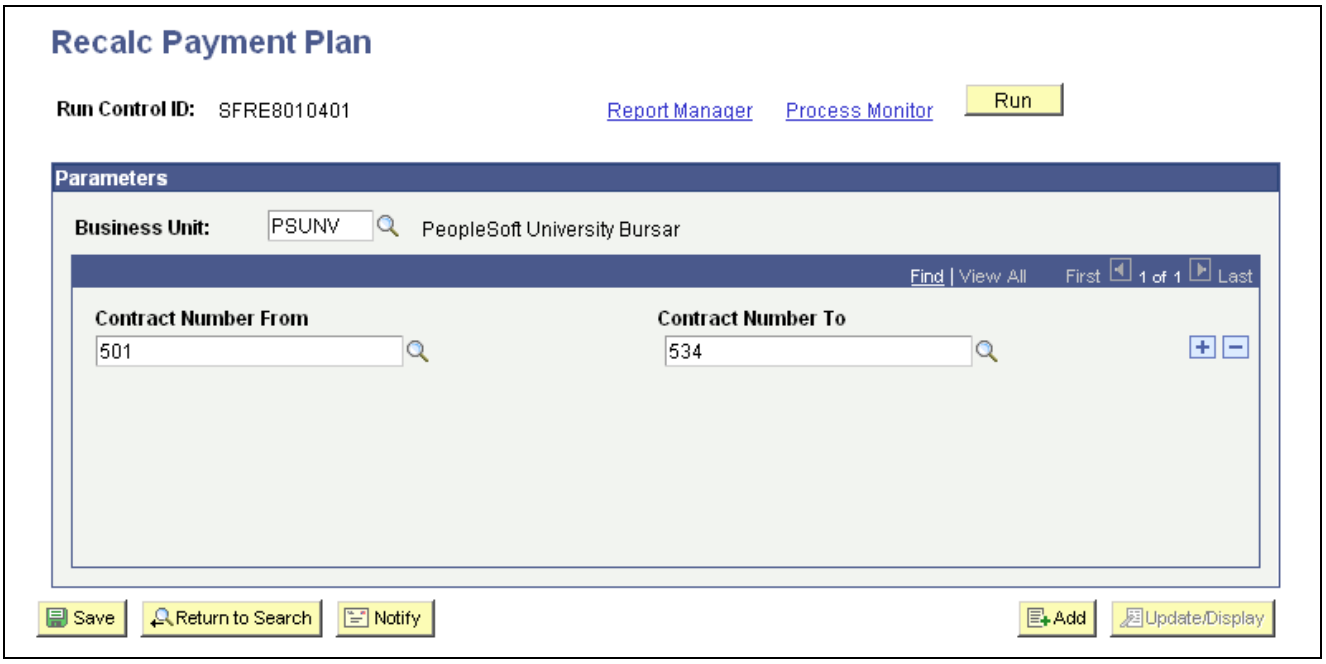


Recalc Payment Plan page

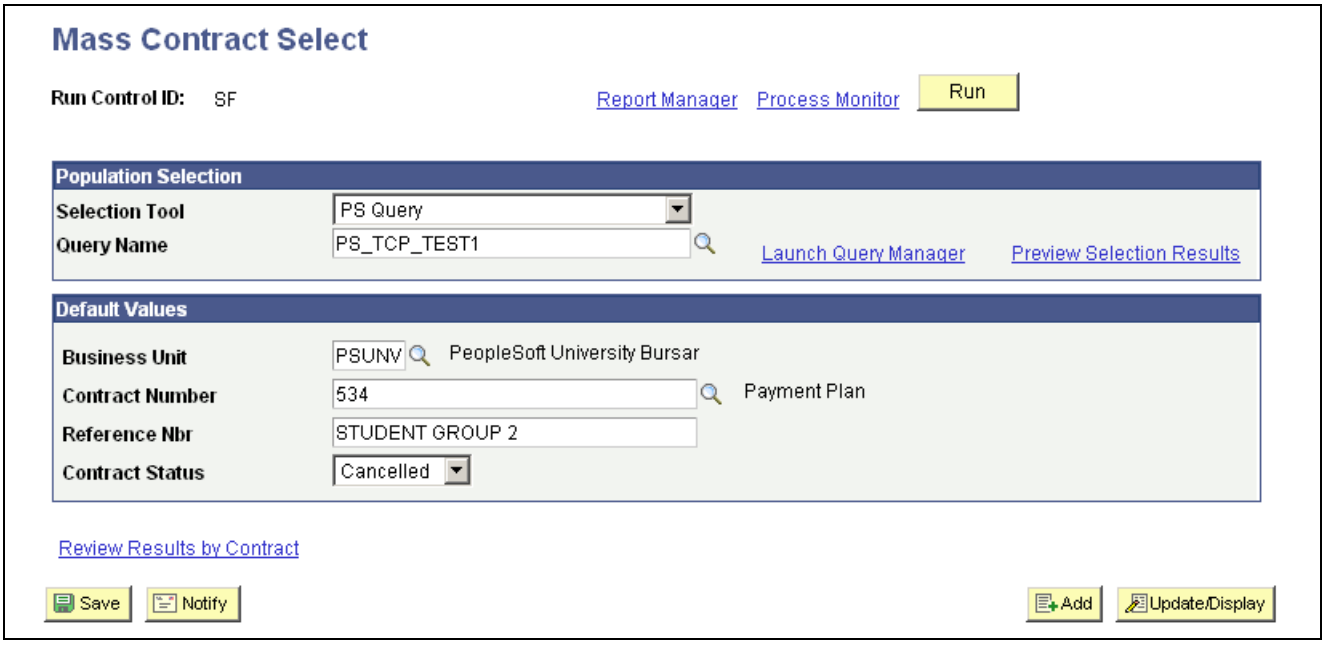
Contract Number From Enter the first contract number to be included in the batch process.

Contract Number To Enter the final contract number to be included in the batch process.

Access the Recalc Third Party Contracts page, if you want to link students to a third-party contract (Student Financials, Payment Plans, Third Party Contract, Assign and ReCalc, Recalc Third Party Contracts).

Processing Mass Cancellations

Access the Mass Contract Select page (Student Financials, Payment Plans, Mass Contract Select).



Mass Contract Select page

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Use this batch process to cancel students from the contract.

This page is used to remove all students from a contract. This function is especially useful to cancel all students from a third-party contract.

Use one of the Population Selection process methods to identify all students within a contract, and then select *Cancelled* in the Status field located within the Default Values group box.

Review the selected records using the Review Results by Contract page, and then use the Assign and Recalc process to proceed with the mass cancellation. The students are canceled from the contract, installments are reversed, and the original charges are reinstated.

See [PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook - Update 1]Using the Population Selection Process.

Population Selection

Selection Tool Select *PS Query, Equation Engine,* or *External File.*

Query Name Enter the appropriate query, equation engine, or file path and name.

Default Values

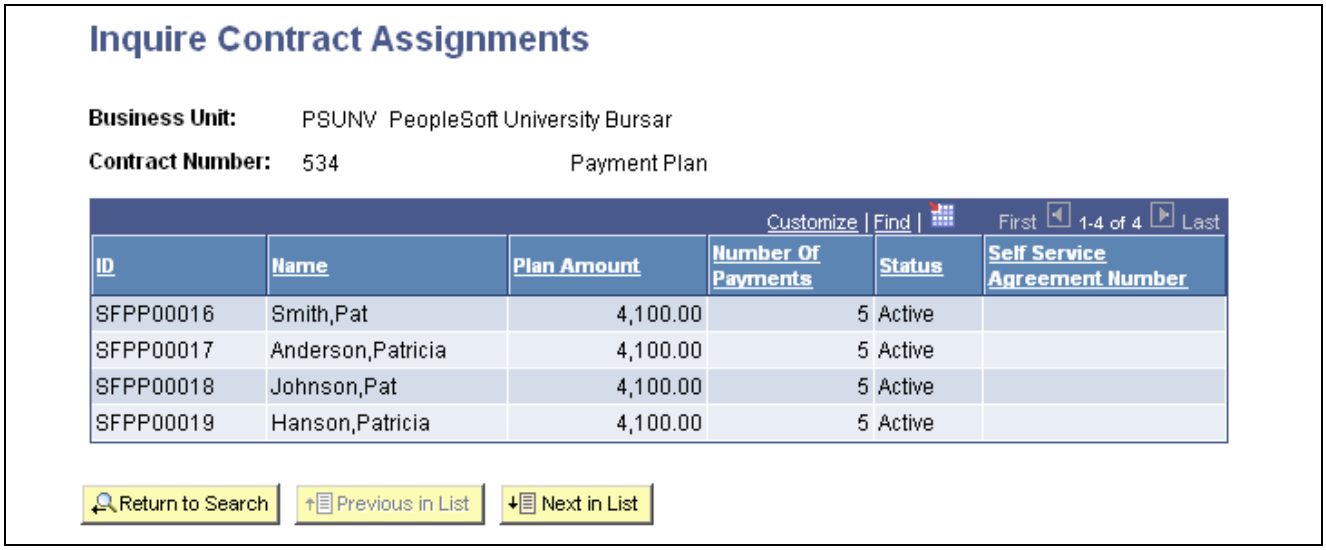
Contract Number Enter the appropriate contract number.

Contract Status Select or cancel a status.

Click the Review Results by Contract link to view the results of the query along with the default values.

Using Inquire Contract Assignments

Access the Inquire Contract Assignments page (Student Financials, Payment Plans, Payment Plan, Inquire Contract Assignments).



Inquire Contract Assignments page

Use the Inquire Contract Assignments page to view all students linked to a payment plan.

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