CHAPTER 1

Using Student Financials Self Service

This chapter provides an overview of the PeopleSoft Student Financials self-service application and discusses how students can:

- View outstanding charges, payments, financial aid, and refunds.
- Create credit card profiles.
- Make self-service payments.
- Purchase miscellaneous items.
- Use account services.

Understanding Student Financials Self Service

Students use Student Financials self service to view outstanding charges, payments, financial aid, and refunds; create and store credit card or eCheck payment profiles; make self-service payments, purchase miscellaneous items, and use account services. What students see when they access Student Financials self service depends on what your institution has defined on the setup pages. For example, you can use Institution Sets to specify not only that students view their account activity by business unit, term, or charge, but you can also decide whether to display payment history, pending payments, charges due, and financial aid totals.

See lsss, Setting Up Student Financials Self Service, Setting Up Institution Sets.

The navigation tabs that are used in Student Financials self service are defined on the Navigation Tabs Setup page.

See Also

lsss, Setting Up Self-Service Navigation

Viewing Outstanding Charges, Payments, Financial Aid, and Refunds

This section discusses how to:

- View an account summary.
- View account activity.
- View charges due details.

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- View details by due date.
- View details by charge.
- View charges due details by due date.
- View invoices due detail.
- View invoice detail.
- View payment history.
- View the charges paid by a payment.
- View pending financial aid.

Pages Used to View Outstanding Charges, Payments, Financial Aid, and Refunds

Page Name	Definition Name	Navigation	Usage
Account Inquiry - Account Summary	SSF_SS_ACCT_SUMM	Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Summary	Review a summary of outstanding charges and deposits, pending payments, pending financial aid, and total due.
Account Inquiry - Account Activity	SSF_SS_ACCT_ACTVTY	Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Activity Click the Activity link or a tab on any page.	Review all of the account activity that has transpired over a fixed period of time. Account activity can include any transactions that have been posted to the student's account, including charges, cash, checks, credit card payments, financial aid, refunds, and so on. Administrators can suppress this page from appearing using the SF Institution Set setup.
Account Inquiry - Charges Due	SSF_SS_CHRGS_DUE	• Self Service, Campus Finances, Account Inquiry, Account Inquiry - Charges Due • Click the Charges Due link or a tab on any page.	Review all outstanding charges and deposits incurred to date, including charge details. Administrators can suppress this page from appearing to the student using the SF Institution Set setup.

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Page Name	Definition Name	Navigation	Usage
Account Inquiry - Payment History	SSF_SS_PMT_HIST	Self Service, Campus Finances, Account Inquiry, Account Inquiry - Payments Click the Payments link or a tab on any page.	Review all payments posted to the account. Administrators can suppress this page from appearing to the student using the SF Institution Set setup. Administrators can select whether pending payments will appear on this page and whether students are permitted to drill down through posted payments to see which charges were reduced by those payments.
Account Inquiry - Pending Financial Aid	SSF_SS_PEND_FINAID	Self Service, Campus Finances, Account Inquiry, Account Inquiry - Pending Financial Aid Click the Pending Aid link or a tab on any page.	Review pending or anticipated aid that has yet been posted to the account. Pending financial aid amounts can be viewed by all terms or by specific terms. Administrators can suppress this page from appearing to the student using the SF Institution Set setup.

Viewing an Account Summary

Access the Account Inquiry - Account Summary page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Summary).

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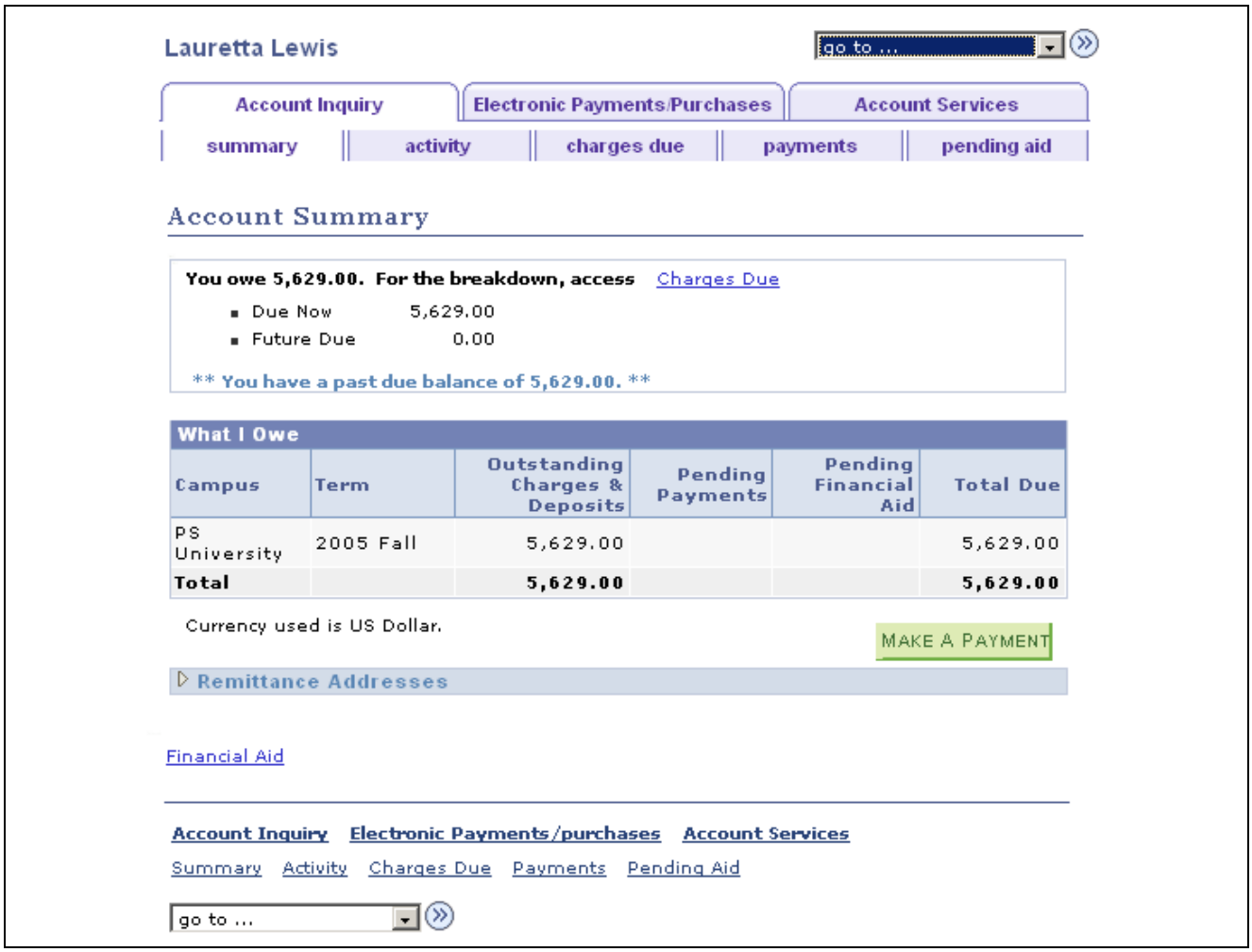

Account Inquiry - Account Summary page

Charges Due Click to access the Charges Due page.

Due Now and **Future Due** The amounts that appear are based on the parameters that are set up in the Days in future for 'due now' field on the Institution Set page. The formula used to calculate the value in the Due Now field is any charges incurred through today's date plus the number of days specified. The formula used to calculate the value in the Future Due field is any charges incurred after today's date plus the number of days specified.

Past Due Balance This amount represents charges that were incurred through yesterday (current date minus 1).

See lsss, Setting Up Student Financials Self Service, Setting Up Institution Sets, Defining Basic Institution Set Parameters.

What I Owe Table

The columns that appear in the What I Owe table are based on the allocation level that you specified on the Institution Set page. An administrator can suppress the Pending Payments and Pending Financial Aid columns.

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Remittance Addresses

The address that appears is based on the location that you selected on the SF Business Unit page.

Viewing Account Activity

Access the Account Inquiry - Account Activity page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Activity).

Posted Date	Item	Term	Charge	Payment	Refund
06/08/2006	Administrative Fees	2006 Spring Qtr	5.00		
06/08/2006	Administrative Fees	2006 Spring Qtr	5.00		
06/08/2006	Book Fees	2006 Spring Qtr	29.95		
06/08/2006	Credit Card - Self Service	2006 Spring Qtr		347.39	
06/08/2006	GST Tax	2006 Spring Qtr	7.60		
06/08/2006	GST Tax	2006 Spring Qtr	7.00		
06/08/2006	Gym Fees	2006 Spring Qtr	152.00		
06/08/2006	Gym Fees	2006 Spring Qtr	140.00		
06/08/2006	PST Tax	2006 Spring Qtr	3.04		
06/08/2006	PST Tax	2006 Spring Qtr	2.80		

Account Inquiry - Account Activity page

Students can filter account activity by campus and term for specific dates or a range of dates. Additionally, students can use Find to search for specific transactions.

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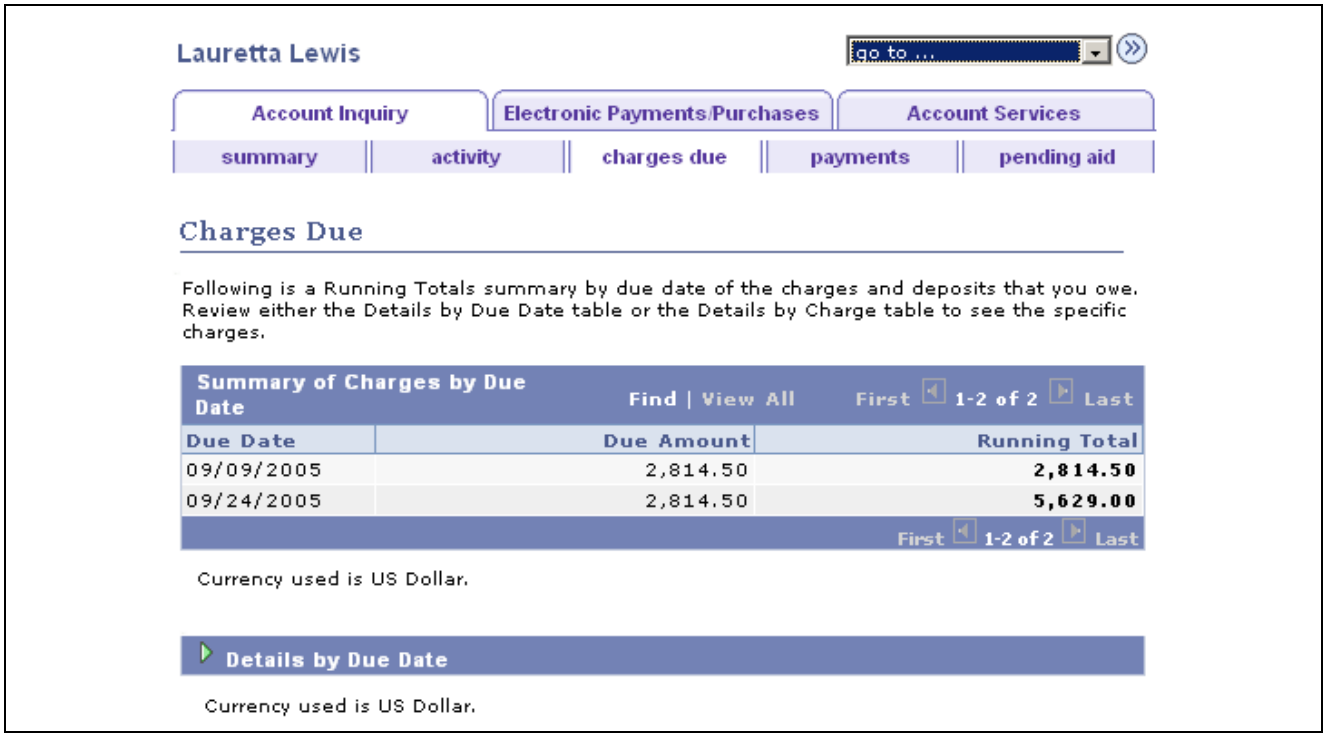
Viewing Charges Due Details

Access the Account Inquiry - Charges Due page (Self Service, Campus Financials, Account Inquiry, Account Inquiry - Charges Due).



Account Inquiry - Charges Due page (1 of 2)

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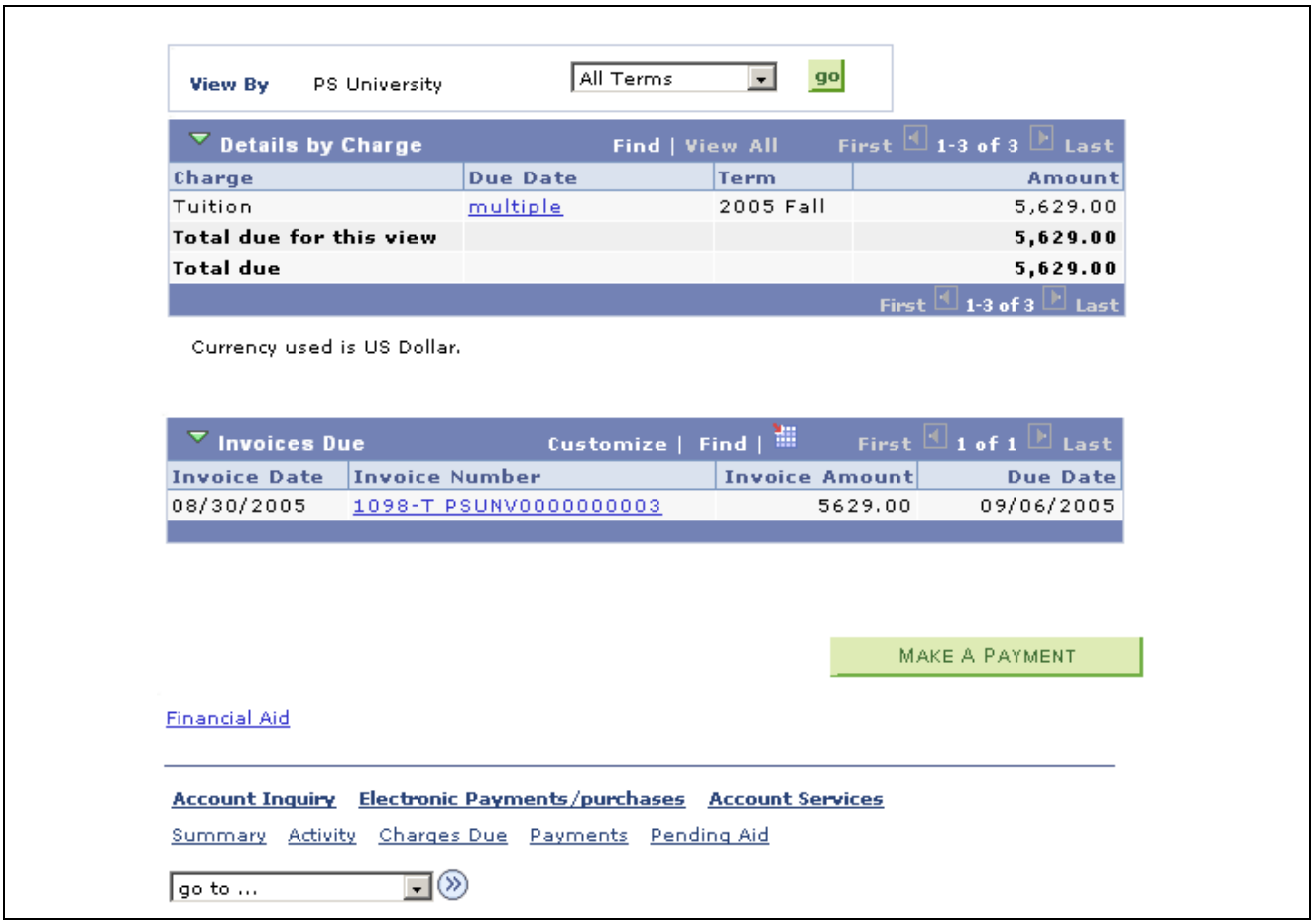

Account Inquiry - Charges Due page (2 of 2)

This page shows three different views of the student's outstanding charges due: a summary of charges by due date, details by due date, and details by type of charge. Click the Details by Due Date region or the Details by Charge region to see the details.

Details by Due Date	Expand this region to view charge details by due date.
Details by Charge	Expand this region to view charge details. Students can filter these by term.
Invoices Due	Expand the Invoice Due region to view invoice details.

Viewing Details by Due Date

Access the Details by Due Date page.

Note. The system displays charges by date within a term.

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Details by Due Date Find | View All First 1-2 of 2 Last

Due Date	Charge	Term	Due Amount	Running Total
09/09/2005	Tuition	2005 Fall	2,314.50	**2,314.50**
09/24/2005	Tuition	2005 Fall	2,814.50	**5,129.00**

First 1-2 of 2 Last

Currency used is US Dollar.

Details by Due Date page

Viewing Details by Charge

Access the Details by Charge page.

Details by Charge Find | View All First 1-3 of 3 Last

Charge	Due Date	Term	Amount
Tuition	multiple	2005 Fall	5,129.00
			5,129.00
			5,129.00

First 1-3 of 3 Last

Currency used is US Dollar.

Details by Charge page

The system displays charges based on the selection in the View By field.

View By Filter the charges due by campus and by term.

multiple If a charge has multiple due dates, click this link to check those dates.

Viewing Charges Due Details by Due Date

Access the Detail By Charge page.

Detail By Charge

Tuition

Details by Due Date

Due Date	Due Amount
09/09/2005	2314.50
09/24/2005	2814.50

Return to Charges Due

Detail By Charge page

Click Return to Charges Due to return to the previous page.

Viewing Invoices Due Detail

Access the Invoices Due page.

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Invoices Due Customize | Find | First 1 of 1 Last

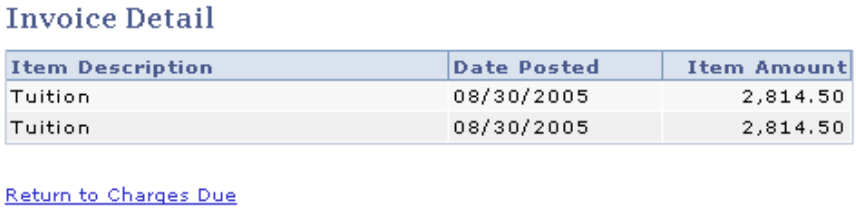
Invoice Date	Invoice Number	Invoice Amount	Due Date
08/30/2005	1098-T PSUNV0000000003	5629.00	09/06/2005

Invoices Due page

This page displays information about invoices that are due.

Viewing Invoice Detail

Access the Invoice Detail page.



Invoice Detail

Item Description	Date Posted	Item Amount
Tuition	08/30/2005	2,814.50
Tuition	08/30/2005	2,814.50

Return to Charges Due

Invoice Detail page

Viewing Payment History

Access the Account Inquiry - Payment History page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Payments).

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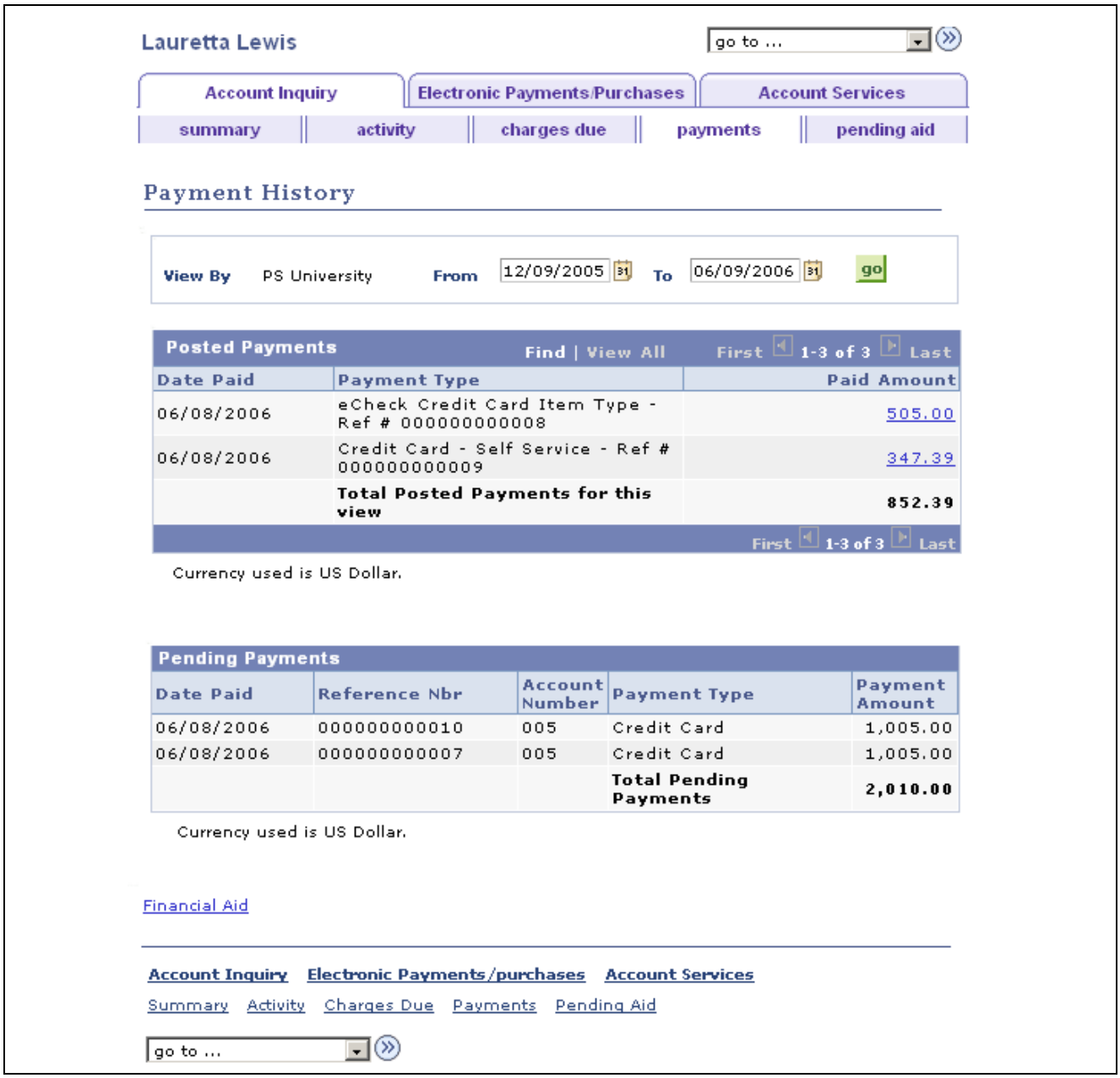

Account Inquiry - Payment History page

Students can filter all posted and pending payment activity by date.

Paid Amount Click to view the specific charges paid by this payment.

Viewing the Charges Paid by a Payment

Access the Payment History - Charges Paid by this Payment page.

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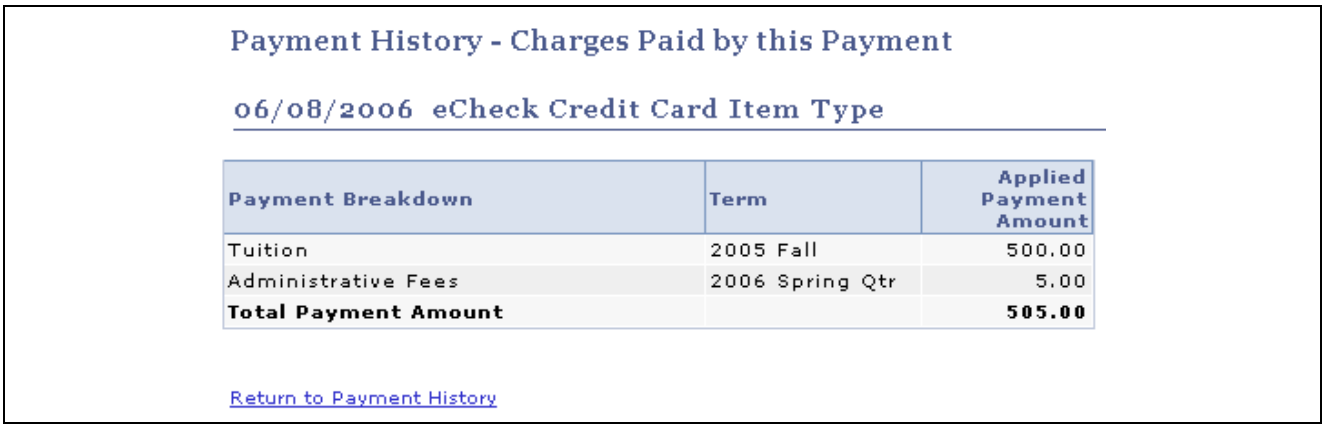
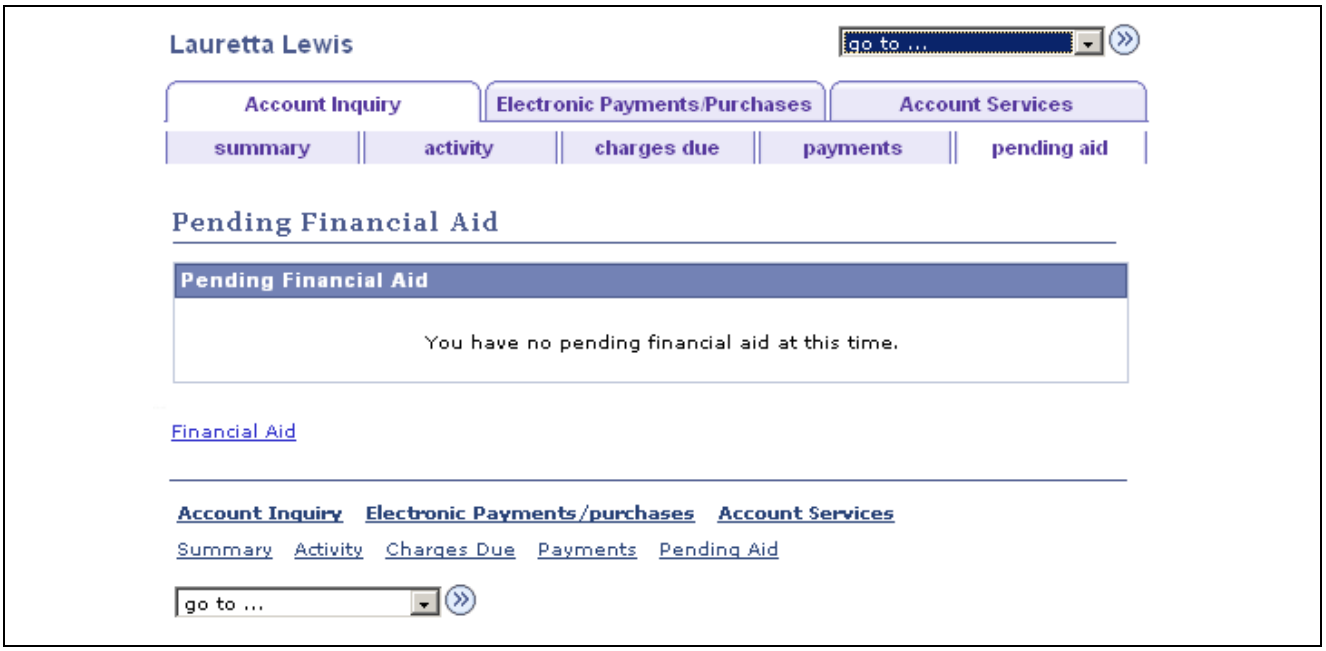


Payment History - Charges Paid by this Payment page

Click the Return to Payment History link to return to the previous page.

Viewing Pending Financial Aid

Access the Account Inquiry - Pending Financial Aid page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Pending Financial Aid).



Account Inquiry - Pending Financial Aid page

View pending financial aid amounts by all terms or by specific terms.

Financial Aid Click to access financial aid information.

See lsss, Using Financial Aid Self Service.

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Creating Payment Profiles

This section provides an overview of self-service payment profiles and discusses how to:

- Add and delete payment profiles.
- View and edit payment profile details.

Understanding Self-Service Payment Profiles

Student Financials enables students to create payment profiles for their various eCheck (checking, savings, or both) or credit card (Visa, MasterCard, American Express, and so on) accounts. By establishing payment profiles, students enter their eCheck and credit card information only once in the Payment Profile component (SS_SF_ACCT_PROFILE). Then, when they make self-service payments, students select the desired payment profile instead of entering their account information. In addition, if a student designates a payment profile as preferred, the system selects that payment profile by default when the student makes a self-service payment.

Note. Payment Profile functionality is not available if you use a hosted payment solution to process your ePayment transactions. Student Financials supports Payment Profiles for customers using non-hosted payment including both Integration Broker and Business Interlink solutions.

Understanding Payment Profile Setup

Use the Self Service Payment Profile check box on the SF Installation 2 page to determine whether to allow students to create, save, and use payment profiles. When the check box is selected, existing self-service payment profiles are retained and students can create and save new profiles.

Note. Clearing the check box does not automatically prevent students from creating and maintaining profiles—you must also run the SSF_PPROFDEL process and remove the Payment Profile component from all permission lists–as documented in the setup chapter.

See lssf, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords.

If you clear the Self Service Payment Profile check box on the SF Installation 2 page, run the SSF_PPROFDEL process, and remove the Payment Profile component from all permission lists:

- The Payment Profile component is not available in Self Service.
- The payment profile tab and payment profile details are not available on any pages in the Make a Payment component or the Purchase Miscellaneous Items component.

  Payment profile buttons do not appear on the Make a Payment - Specify Payment Details page or the Purchase Items - Specify Payment Details page. Students cannot save a payment profile or use an existing profile during the payment transaction.

  Payment profile details do not appear in the Confirmation Details section on the Make a Payment – Payment Result page.

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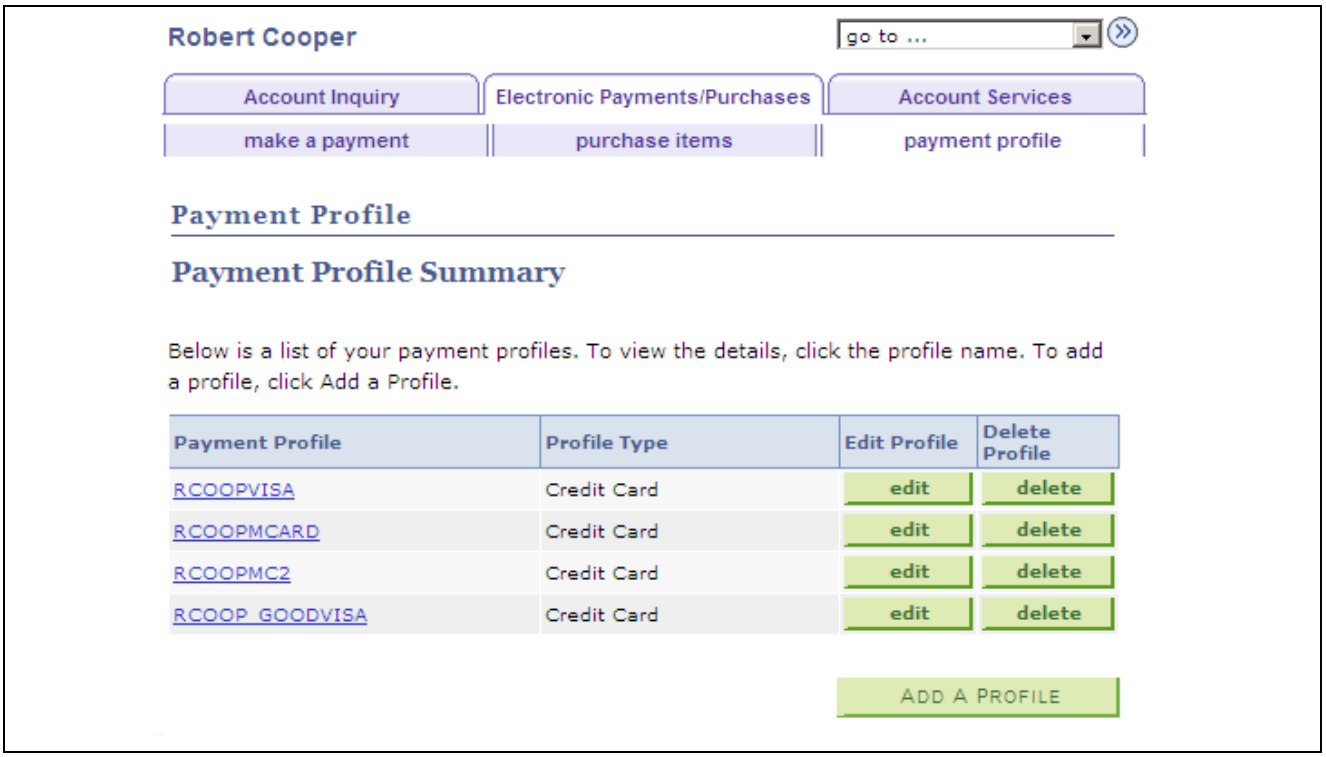
Pages Used to Create Self-Service Payment Profiles

Page Name	Definition Name	Navigation	Usage
Electronic Payments/Purchases - Payment Profile - Payment Profile Summary	SS_SF_ACCT_PROFILE	Self Service, Campus Finances, Electronic Payments/Purchases - Payment Profile - Payment Profile Summary	View payment profiles. If students have established profiles, they appear here.
Electronic Payments/Purchases - Payment Profile - Profile Detail	SS_SF_ACCT_PRFL_D	Self Service, Campus Finances, Payment Profile, Electronic Payments/Purchases - Payment Profile - Profile Detail. Click the link of the appropriate profile.	View payment profiles.
Electronic Payments/Purchases - Payment Profile - Edit Payment Profile	SS_SF_ACCT_PRFL_D	Click the Edit or Delete button next to the appropriate profile to edit or delete the details of the payment profile.	Edit or delete details for payment profiles.

Adding and Deleting Payment Profiles

Access the Electronic Payments/Purchases - Payment Profile - Payment Profile Summary page (Self Service, Campus Finances, Payment Profile, Electronic Payments/Purchases - Payment Profile - Payment Profile Summary).



Electronic Payments/Purchases - Payment Profile - Payment Profile Summary page

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If a student has not yet created a payment profile, the table is empty. Click the Add A Profile button to create a payment profile.

Payment Profile	Click a link under this heading to access a view-only version of the Payment Profile - Payment Profile Summary page.
Profile Type	Indicates whether the profile is for an *Electronic Check* or *Credit Card* account.
Edit Profile	Click to access an editable version of the Payment Profile - Payment Profile Summary page.
Delete Profile	Click next to the payment profile that you want to delete.
Add a Profile	Click to add a new payment profile.

Viewing and Editing Payment Profile Details

Access the Electronic Payments/Purchases - Payment Profile - Profile Detail page (Self Service, Campus Finances, Payment Profile, Payment Profile - Profile Detail and click the link of the appropriate profile).

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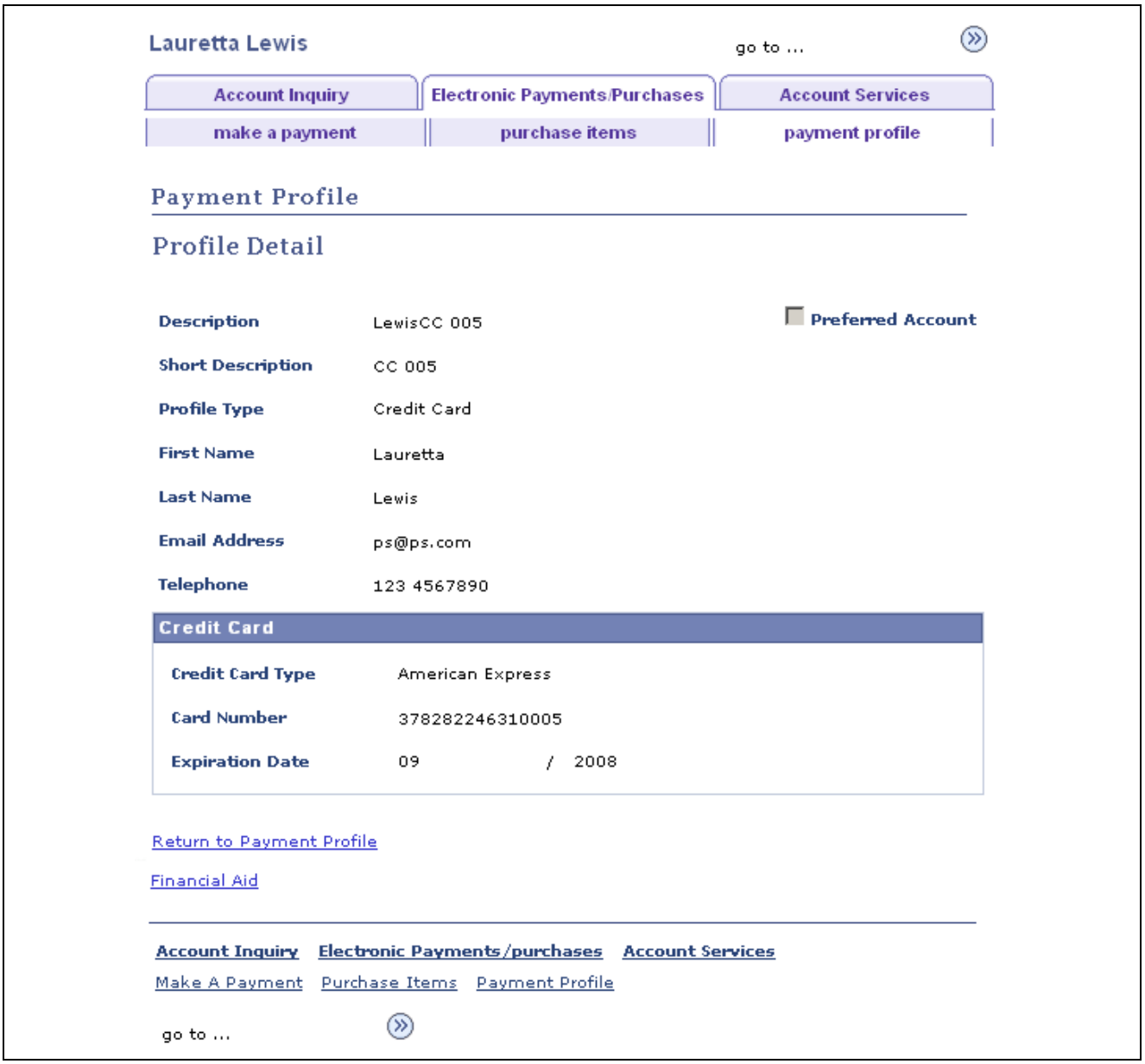

Electronic Payments/Purchases - Payment Profile - Profile Detail page

Preferred Account Select to designate this payment profile (Edit mode only) as the one that the system selects by default whenever the student makes a self-service payment. A student can have only one preferred payment profile per profile (or payment) type.

Profile Type Specify whether the profile is for an *Electronic Check* or *Credit Card* account. If you select *Electronic Check*, the eCheck group box becomes available. If you select *Credit Card*, the Credit Card group box becomes available.

eCheck

Specify whether the account that you are defining is a checking or savings account and enter the appropriate routing and account numbers.

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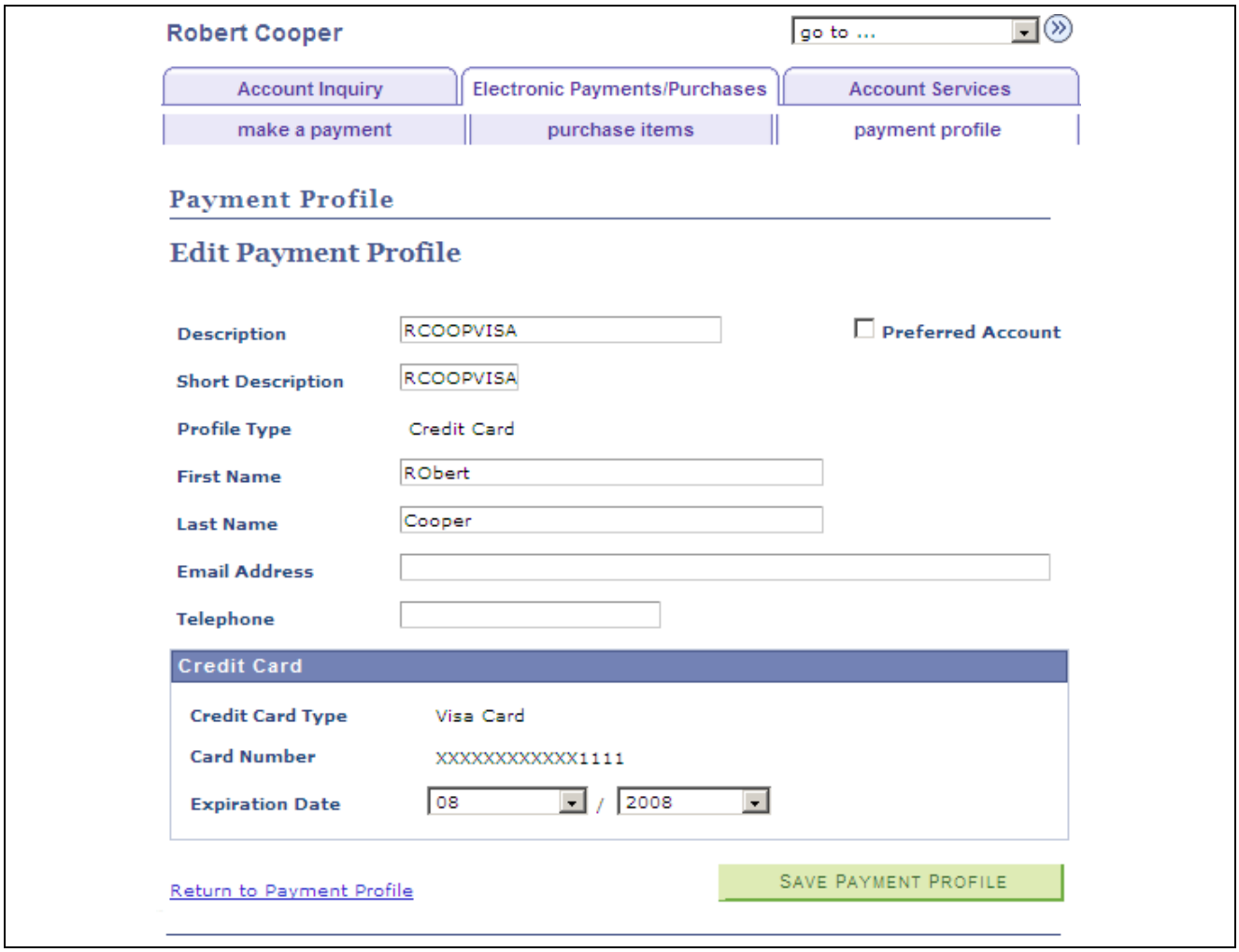
Credit Card

Select the credit card type and enter the credit card number and expiration date.

Editing or Deleting Payment Profile Details

Access the Electronic Payments/Purchases - Payment Profile - Edit Payment Profile page (click the Edit or Delete button next to the appropriate profile to edit or delete the details of the payment profile).

The credit card type and credit card number are read-only, and the card number is masked.



Electronic Payments/Purchases - Payment Profile - Edit Payment Profile page

Making Self-Service Payments

This section provides an overview of self-service payments, lists prerequisites, and discusses how to:

- Specify payment amounts.
- Select payment methods.
- Redirect to hosted payment site.

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- Specify payment details (hosted payment).
- Specify payment details (non-hosted payment).
- Confirm payments (hosted and non-hosted payments).
- View successful payment results (hosted and non-hosted payments).
- View declined payment results (hosted and non-hosted payments).

Understanding Self-Service Payments

The self-service feature of PeopleSoft Student Financials enables students to access their account information and make payments over the internet. The self-service pages can be accessed from the Student Center, the Account Inquiry page, or the menu navigation.

Self-Service Account Review

Students often want to view their account information more than once a month when they receive their statements from the institution. Using self service, students can view up-to-date information about their accounts at any time.

Total Due Charges Review

When students want to know how much money they owe to the institution, they may not want to review all of their account activity for each term. The Campus Finances self-service component provides a direct way for students to see their due charges.

Self-Service Payments

The Make a Payment self-service component (SSF_SS_PAYMENT) enables students to make electronic payments toward their account, using credit card or eCheck depending on the form of payment that your institution accepts. Additionally, if you set up your institution to allow it, students can allocate their self-service payments to specific charges.

The Make a Payment pages appear and function differently depending on whether you use the hosted payment feature.

If you use the hosted payment feature for self-service ePayment transactions, the step numbers that represent the number of pages or steps required to complete the transaction do not appear on the Make a Payment pages because part of the transaction is performed on the external hosted payment provider site. The numbers appear on the pages if you do not use hosted payment.

Note. If your setup allows for the charges that are payable by credit card to be different from the charges that are payable by electronic check, the Select Payment Method page appears before the Specify Payment Amount page. If the charge priority is the same for credit card and electronic check, the Specify Payment Amount page appears first because it does not change regardless of the payment method that the student selects. The order of appearance of the pages is the same whether you use hosted or non-hosted payment.

See lssf, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords.

Note. Whether payment profile functionality is available in the Make a Payment component depends on your self-service setup and also on whether you use hosted payment.

See lsss, Using Student Financials Self Service, Creating Payment Profiles, Understanding Self-Service Payment Profiles.

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See lssf, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords.

See Electronic Payment Integration Developer's Reference Guide. The guide is posted to My Oracle Support, ID 968171.1

Messaging

The PeopleSoft application delivers a set of messages that accompany many of the self-service pages. These messages are intended to help students through the self-service experience. These messages are user-defined in the Message Catalog, and they can be modified by an administrator. They appear at the top of most pages. For instance, if a student is paying with an eCheck, then the student receives the following message about his or her Personal Identification Number (PIN) as a potential requirement for user authentication: *You will need your PIN in order to submit an eCheck Transaction.* Messages can be changed only by an administrator.

Prerequisites

Before students can access their accounts over the internet, you must set up your PeopleSoft Student Financials system to allow them to do so by setting up a Payment Merchant, SF Merchant, and Institution Set. The choices that you make when setting up an institution set determine what your students can see and do when accessing their accounts. Different fields and pages are available to your students depending on how you set up the institution set.

See lssf, Setting Up ePayment Processing, Setting Up Payment Merchants.

See lsss, Setting Up Student Financials Self Service, Setting Up Institution Sets and lssf, Setting Up ePayment Processing, Setting Up SF Merchants.

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Pages Used to Make Self-Service Payments

Page Name	Definition Name	Navigation	Usage
Electronic Payments/Purchases - Make a Payment - Specify Payment Amount	SSF_SS_PMT_ALLOC	Self Service, Campus Finances, Make a Payment, Electronic Payments/Purchases - Make a Payment	Specify the amount to pay toward outstanding charges.
Electronic Payments/Purchases - Make a Payment - Select Payment Method	SSF_SS_PMT_METHOD	Click the Next button on the Make a Payment - Specify Payment Amount.	Depending on whether the institution supports both the eCheck and credit card payment methods, select the method by which to make a payment.
Electronic Payments/Purchases - Make a Payment - Confirm Payment	SSF_SS_PMT_MSG	For hosted payment only: Click the Next button on the Make a Payment - Select Payment Method page.	Advise students that their payments will be collected through a third party provider. When a student clicks the Continue to Make Payment button, the student is transferred to the third party site to input credit card or eCheck details.
Electronic Payments/Purchases - Make a Payment - Specify Payment Details	SSF_SS_PMT_CR_CARD	For non-hosted payment only: Click the Next button on the Make a Payment - Select Payment Method page.	Specify either the credit card or eCheck payment details for the current transaction.
What is a Security Code	SSF_CVV_ABOUT	Click the What is a Security Code? link on the Make a Payment - Specify Payment Details page.	Access information about the Security Code that is located on credit cards.
Electronic Payments/Purchases - Make a Payment - Confirm Payment	SSF_SS_PMT_SUBMIT	For non-hosted payment, click the Next button on the Make a Payment - Specify Payment Details page. For hosted payment, click Continue from the third party site.	Confirm payment details. This page appears differently for hosted and non-hosted payments.
Electronic Payments/Purchases - Make a Payment - Payment Result	SSF_SS_PMT_RESULT	Click the Submit button on the Make a Payment - Confirm Payment page.	View successful and declined payment results.

Specifying Payment Amounts

The transaction flow that is discussed here assumes that charge priorities for credit card and echeck are the same—therefore, the Make a Payment - Specify Payment Amount page appears first.

Access the Make a Payment - Specify Payment Amount page.

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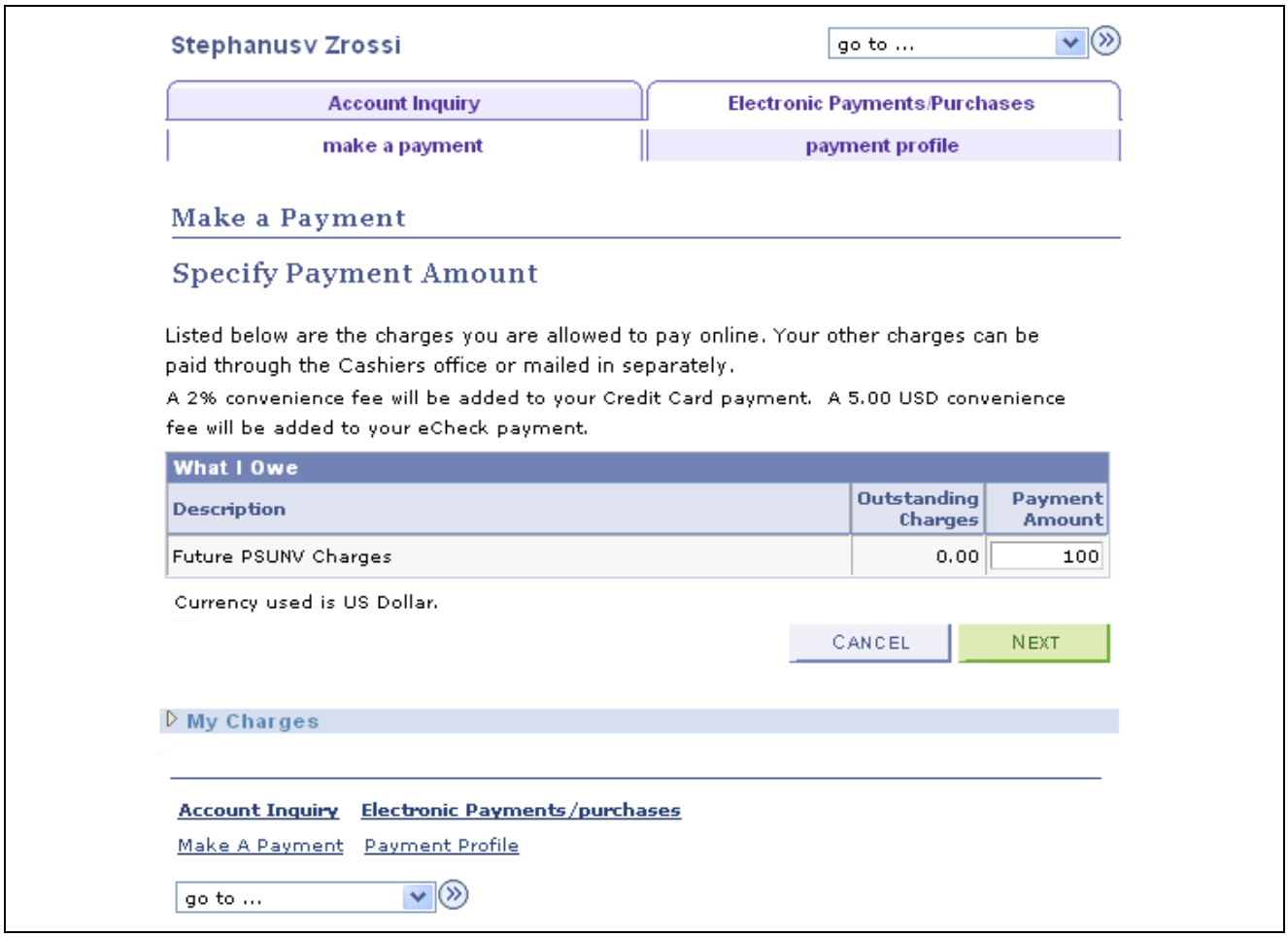

Make a Payment - Specify Payment Amount page

This page is the same for hosted and non-hosted payment modes, except that a message about a PIN being required for echeck transactions appears for non-hosted payment.

What I Owe Table

The columns that appear in the What I Owe table are based on the allocation level that you specified on the Institution Set page.

Payment Amount	Enter different amounts for each of the charges that appear.
pay all charges	Click to pay all charges listed.
zero out amounts	Click to zero out amounts in the Payment Amount fields.
calculate total	Click to calculate the amounts in the Payment Amount fields.

Charges Due Table

The Charges Due table appears only if the Display Charges Due check box is selected on the SF Institution Set setup. The Charges Due table is based on what your institution defined in the setup. If the allocation level that you specified on the Institution Set page is *By Business Unit*, the charge details will be grouped by business unit. If the allocation level that you specified on the Institution Set page is *By Term*, the charge details will be grouped by term within the business unit.

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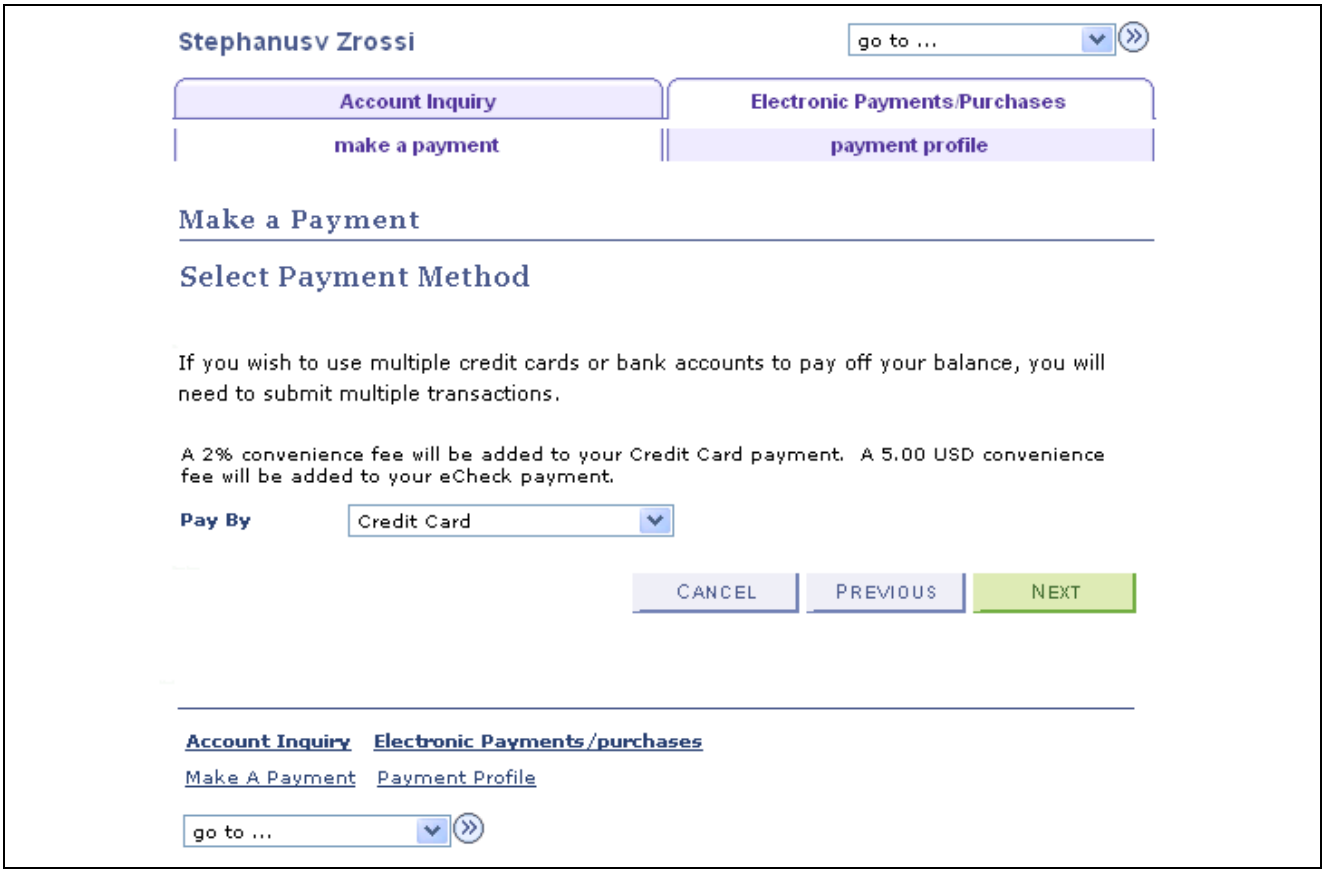
Multiple If a charge has multiple due dates, click this link to check those dates.

Selecting Payment Methods

Access the Make a Payment - Select Payment Method page.



Make a Payment - Select Payment Method page

This appearance of this page is the same for hosted and non-hosted payment modes.

This page enables students to choose whether to pay by credit card or by eCheck. This page appears for students only if you enter a value in both the SF Credit Card Merchant ID and SF eCheck Merchant ID fields for the associated institution set. If you allow only one type of payment, this page does not appear and the only payment method available appears by default.

Note. The selection that a student makes determines which charges are eligible for payment according to the charge priority list that the institution defined for the item type associated with the selected payment method. For example, if a student selects *Electronic Check*, the Payment Details page and the Payment Amount page display only the charges on the student's account that are eligible for payment by the eCheck item type defined.

See Also

lsss, Setting Up Student Financials Self Service, Setting Up Institution Sets, Defining Basic Institution Set Parameters

lssf, Completing Student Financials General Setup, Setting Up Item Types and Item Type Groups, Defining Miscellaneous Parameters for Item Types

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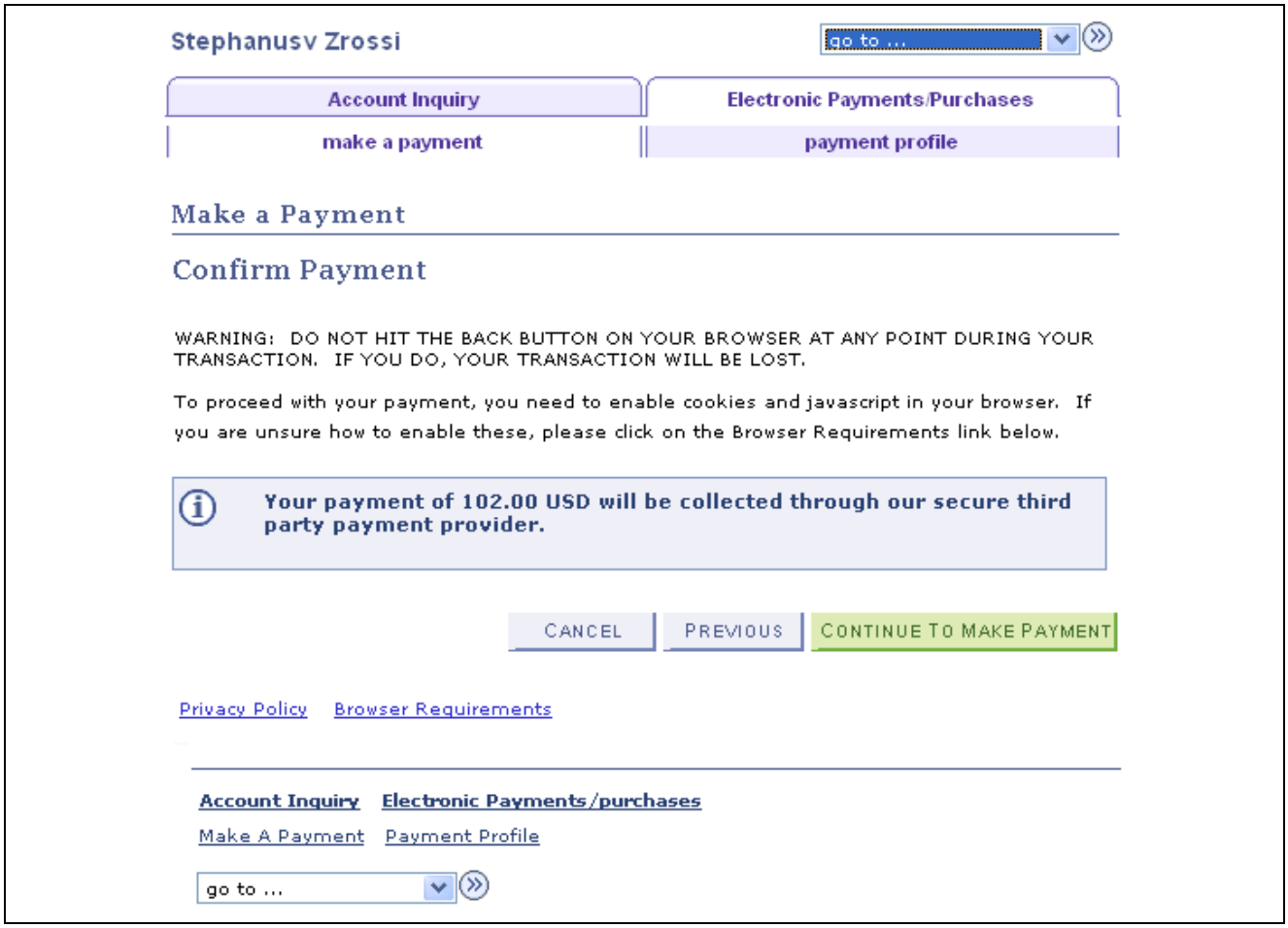
Redirecting to Hosted Payment Site

This section applies only if you use hosted payment mode.

If you use hosted payment, after a student selects a payment method and clicks NEXT on the Make a Payment - Select Payment Method page, the Make a Payment - Confirm Payment page appears.

Access the Make a Payment - Confirm Payment page.



Make a Payment - Confirm Payment page

The browser message, Browser Requirements link, and Privacy Policy link appear based on the setup on the Electronic Payments and Payment Merchant pages.

See lssf, Setting Up ePayment Processing, Setting Up Payment Merchants, Defining Electronic Payment Merchants.

See lsss, Setting Up Student Financials Self Service, Setting Up Institution Sets, Defining Self-Service ePayments for Institution Sets.

Specifying Payment Details (Hosted Payment)

This section applies to hosted payment only.

When the student clicks the Continue to Make Payment button, information about the payment is sent to the third party Payment provider, and the student is transferred to the third party site to input the credit card or eCheck details.

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Here is an example page:

Sample third party page

The student enters payment details on the third party hosted site. The student clicks Continue to return to Campus Solutions. Authorization does not occur here. Buttons and images on the page might be configurable at the third party site.

If the student clicks Cancel from the third party hosted site, the student is taken to a page in self-service Make a Payment which displays a message advising that the payment is canceled:

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Make a Payment page: Canceled payment

The payment status is updated to Canceled. Similarly, if an error occurs, the student is taken to the Payment Result page and the payment status is updated to Error.

Specifying Payment Details (Non-Hosted Payment)

This section applies to non-hosted payment only.

Access the Make a Payment - Specify Payment Details page.

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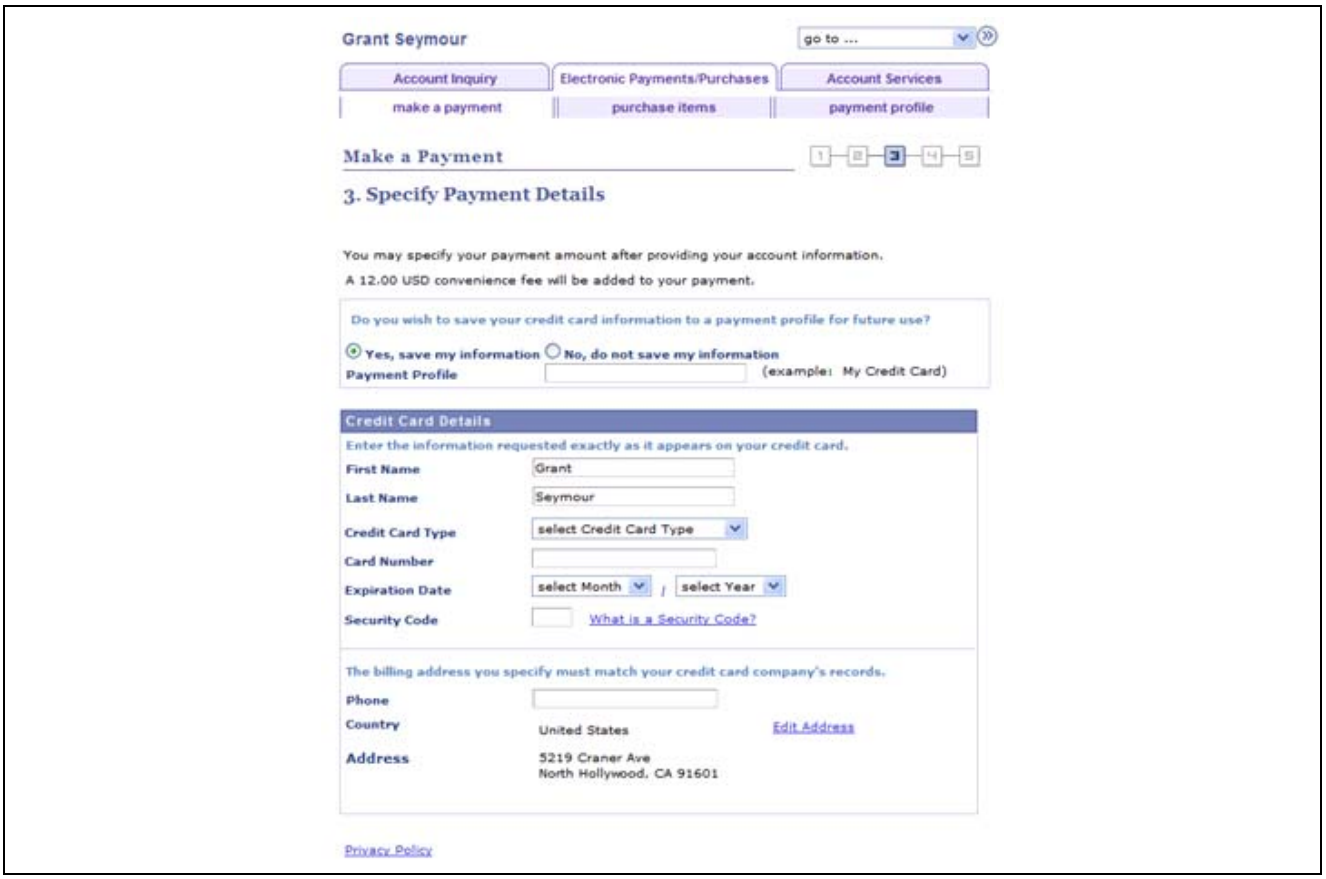

Make a Payment - Specify Payment Details page

If a student has not created a payment profile before accessing this page, the student must create one from this page to be able to enter or confirm ePayment information.

Payment Profile options are only available if the Self Service Payment Profile check box is selected on the SF Installation 2 page (Set Up SACR, Install, Student Fin Installation, SF Installation 2).

See lssf, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords, Defining Keyword Edit Tables and a Null Due Date.

Create New Profile, Use Existing Profile, Do not use Profile, and **Save Payment Profile**	Select one of these options, depending on whether a payment profile was already created. If the Use Existing Profile option is selected, the student cannot update the credit card type, credit card number, account type or account number. Account specific date can only be entered if the student selects one of the following options, Create New Profile or Do not use Profile. You can also use this attribute to update an existing Payment Profile as part of successfully transmitting an ePayment transaction.
Payment Profile	If a student has created a payment profile, select it from the Payment Profile drop-down list box.

Depending on whether the student chose credit card or electronic check, the following fields will differ.

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Credit Card Details

First Name and **Last Name** Enter the first and last name on the bank account.

Credit Card Type Select the type of credit card to use. The type of credit card is masked.

Note. The type of credit card is masked.

Credit Card Number Enter the credit card number.

Note. The credit card number is masked.

Expiration Year and Date Enter the expiration year and date for the credit card.

Security Code Enter the Security Code that is located on the credit card.

It is a security feature for "card not present" transactions such as Internet transactions.

The Security Code field is available if the Security Code Required check box is selected on the SF Merchants page.

See lssf, Setting Up ePayment Processing, Setting Up SF Merchants.

What is a Security Code? Click this link to access the What is a Security Code page.

Telephone Enter the telephone number.

Country and **Address** Based on the Address Usage option and the student's address table, the system retrieves the appropriate address.

Edit Address Click to change the address for the current ePayment transaction.

eCheck Account Details

First Name and **Last Name** Enter the first and last name on the bank account.

Bank Account Type Select the type of bank account to use.

Routing Number Enter the routing number for the bank account.

Account Number Enter the account number for the bank account. The eCheck account number is masked.

Telephone Enter the telephone number.

Country and **Address** Based on the Address Usage option and the student's address table, the system retrieves the appropriate address.

Edit Address Click to change the address for the current ePayment transaction.

Privacy Policy

Privacy Policy This link is available if the Display Privacy Policy check box is selected on the Electronic Payments page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Electronic Payments).

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Confirming Payments (Hosted and Non-Hosted Payments)

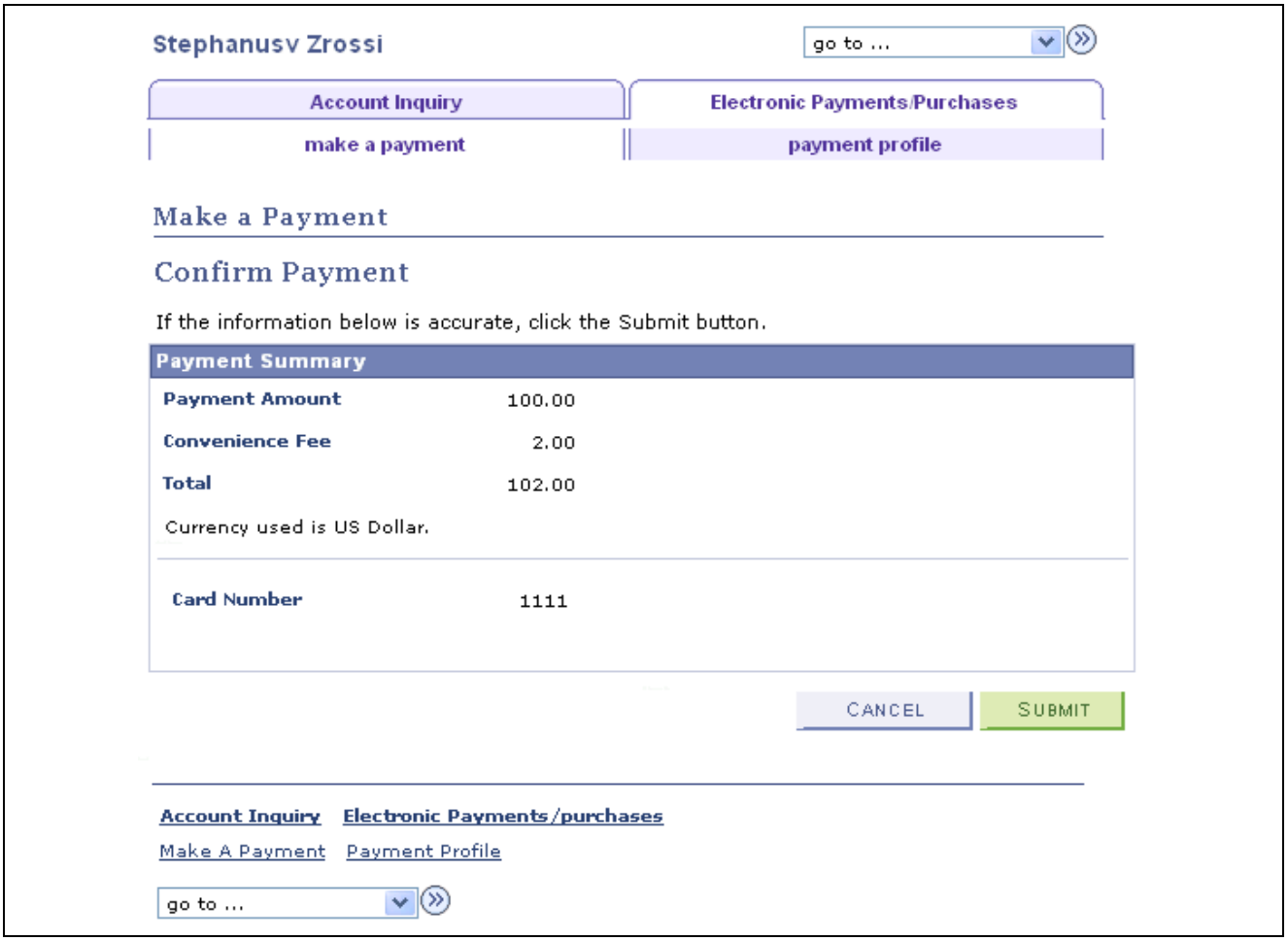
The Make a Payment - Confirm Payment page confirms the payments that students want to submit. The information that appears in the Payment Summary region reflects whether students made payments by credit card or eCheck.

Information that is not collected, such as address and email, does not appear on this page.

The page appears differently for hosted and non-hosted payment modes.

Hosted Payment Mode

Access the Make a Payment - Confirm Payment page.



Make a Payment - Confirm Payment page (hosted payment)

In hosted payment mode, the change payment amount and change payment details buttons are not available. Only the CANCEL and SUBMIT buttons are available to the student. The student cannot make changes to the amount or payment details (credit card or bank account information) because of the external third party provider relationship.

Depending on the third party provider, only the last 4 digits of the credit card number or bank number might be retrieved from the third party payment provider and displayed to the student prior to the authorization. Whether this information appears on the Confirm Payment page depends on whether the third party provider sends the information to Student Financials.

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Where possible, after the payment is authorized, the credit card type and bank account type are stored by Student Financials in the database, as it is a valuable reconciliation tool.

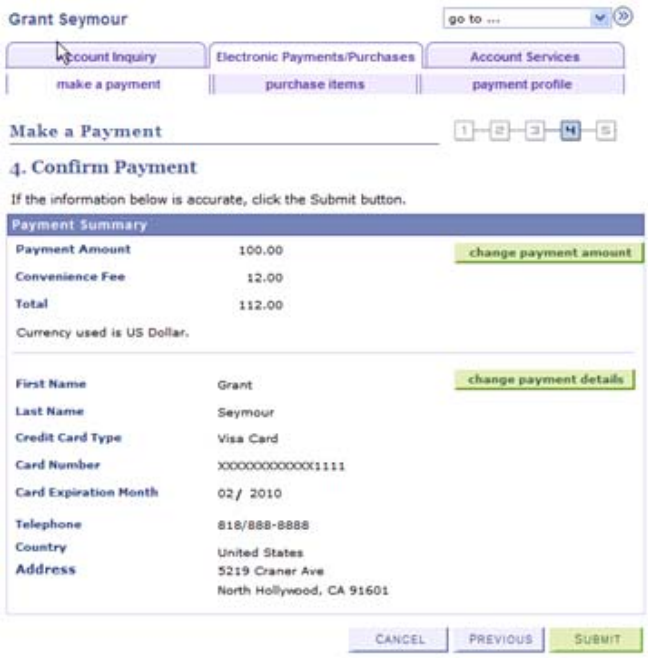
If a student clicks the CANCEL button, the payment is already saved as Initiated even if the student clicks YES to confirm the cancellation action.

Non-Hosted Payment Mode

In non-hosted payment mode, more information, such as student details, appear on the page, and a student can change payment amount or details using the change payment amount and change payment details buttons.

If a student clicks the CANCEL button, and then clicks Yes to confirm the cancellation action, the payment is not saved.

Here is an example of the page in non-hosted mode:



Make a Payment - Confirm Payment page (non-hosted payment)

Viewing Successful Payment Results (Hosted and Non-Hosted Payments)

Access the Make a Payment - Payment Result page.

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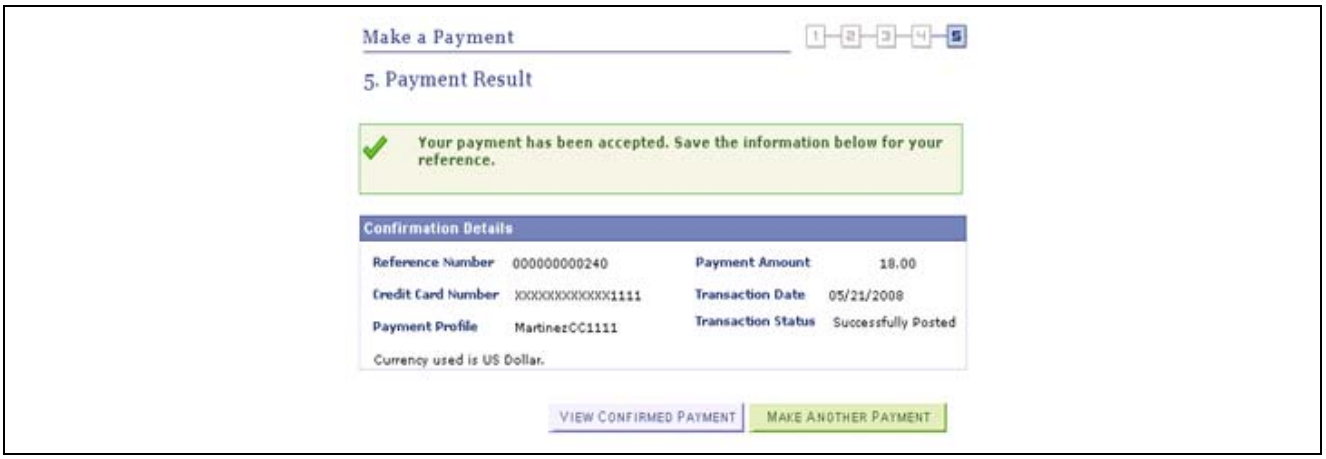


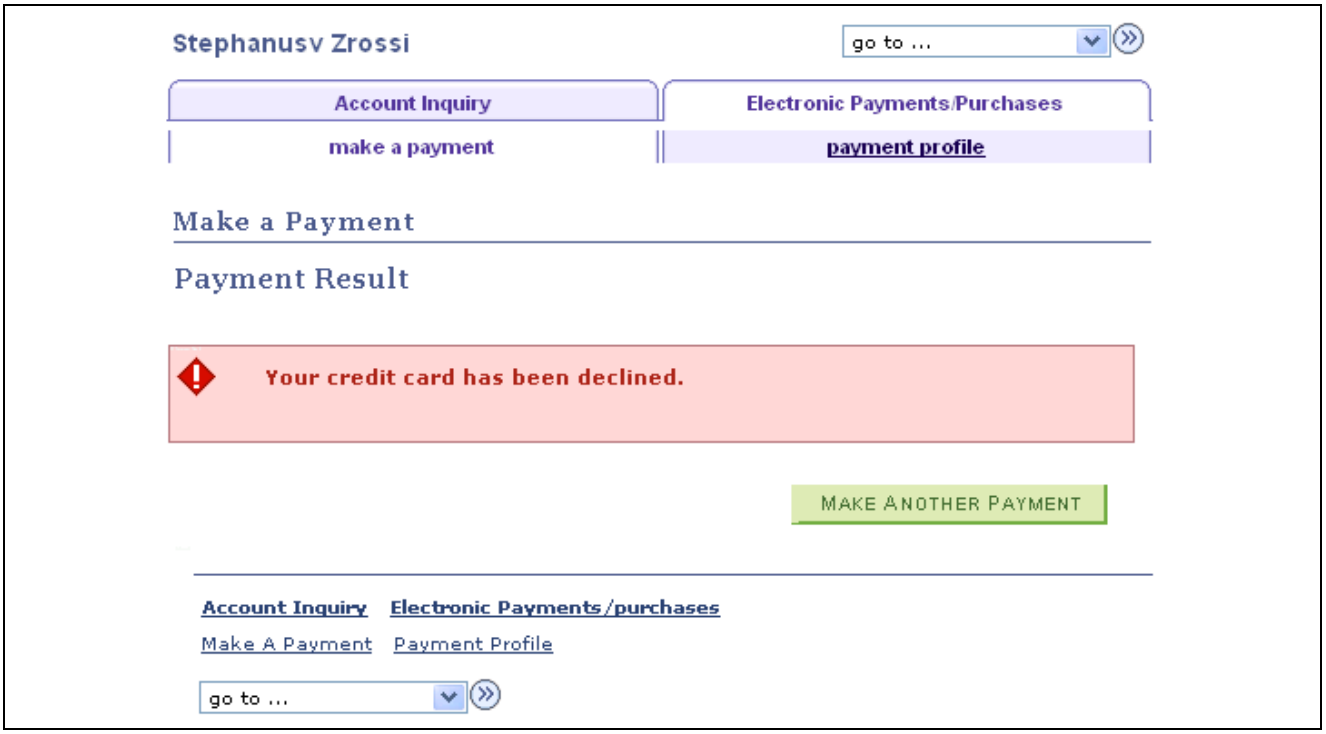
Make a Payment - Payment Result

The page appears the same in hosted payment and non-hosted payment modes, except that in hosted mode, a payment profile is not created and displayed on the page.

View Confirmed Payment	Click to go to the Payments tab to verify the recently submitted transaction. This button is available only following a successfully submitted transaction.
Make Another Payment	Click to start the Make a Payment process from the beginning.

Viewing Declined Payment Results (Hosted and Non-Hosted Payments)

Access the Make a Payment - Payment Result page.



Make a Payment - Payment Result page (payment declined)

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In hosted payment mode, the RESUBMIT PAYMENT button is not available. The student can only make a new payment.

Resubmit Payment This button is available only in non-hosted payment mode.

Click to review and edit the retained payment data. To start over, click Make Another Payment.

Make Another Payment Click to begin the Make a Payment process from the beginning.

Purchasing Miscellaneous Items

Your institution may provide access to students and others to select and purchase miscellaneous items or services outside of the regular tuition and fees calculated by Tuition Calculation. After selecting and purchasing these items or services, you will be routed to Make a Payment pages, where the transaction will be completed.

This section discusses how to:

- Purchase miscellaneous items.
- Select items.
- Confirm an order.
- Make a payment.

Note. Whether payment profile functionality is available in the Purchase Miscellaneous Items component depends on your self-service setup and on whether you use hosted payment.

See lsss, Using Student Financials Self Service, Creating Payment Profiles, Understanding Self-Service Payment Profiles.

See lssf, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords.

Note. Using hosted payment does not impact how you select items for purchase. However, the payment process for purchasing miscellaneous items is different depending on whether you use hosted or non-hosted payment. Refer to the Making Self-Service Payments section earlier in this chapter.

See lsss, Using Student Financials Self Service, Making Self-Service Payments.

Pages Used to Purchase Miscellaneous Items

Page Name	Definition Name	Navigation	Usage
Electronic Payments/Purchases - Purchase Items - Select Campus	SSF_SS_BU_SELECT	• Self Service, Campus Finances, Purchase Miscellaneous Items - Select Campus • Access step 1 of the Purchase Items Wizard.	Select the campus from which to make a purchase.

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Page Name	Definition Name	Navigation	Usage
Electronic Payments/Purchases - Purchase Items - Select Items	SSF_SS_MISC_PUR	• Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Campus Click the Next button. • Access step 2 of the Purchase Items Wizard.	Enter the quantity of the purchased items.
Electronic Payments/Purchases - Purchase Items - Confirm Order	SSF_SS_PMT_ITMCONF	• Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Items Click the Next button. • Access step 3 of the Purchase Items Wizard.	Verify the amount and total of the items to be purchased.
Electronic Payments/Purchases - Purchase Items- Select Payment Method	SSF_SS_PMT_METHOD	Click the Next button on the Purchase Items - Confirm Order page	Depending on whether the institution supports both the eCheck and credit card payment methods, select the method by which to make a payment.
Electronic Payments/Purchases - Purchase Items - Confirm Payment	SSF_SS_PMT_MSG	For hosted payment only: Click the Next button on the Purchase Items - Select Payment Method page.	Advise students that their payments will be collected through a third party provider. When a student clicks the Continue to Make Payment button, the student is transferred to the third party site to input credit card or eCheck details.
Electronic Payments/Purchases - Purchase Items - Specify Payment Details	SSF_SS_PMT_CR_CARD	For non-hosted payment only: Click the Next button on the Purchase Items - Select Payment Method page.	Specify either the credit card or eCheck payment details for the current transaction.
What is a Security Code	SSF_CVV_ABOUT	Click the What is a Security Code? link on the Purchase Items - Specify Payment Details page.	Access information about the Security Code that is located on credit cards.
Electronic Payments/Purchases - Purchase Items- Confirm Payment	SSF_SS_PMT_SUBMIT	For non-hosted payment, click the Next button on the Purchase Items - Specify Payment Details page. For hosted payment, click Continue from the third party site.	Confirm payment details. This page appears differently for hosted and non-hosted payments.

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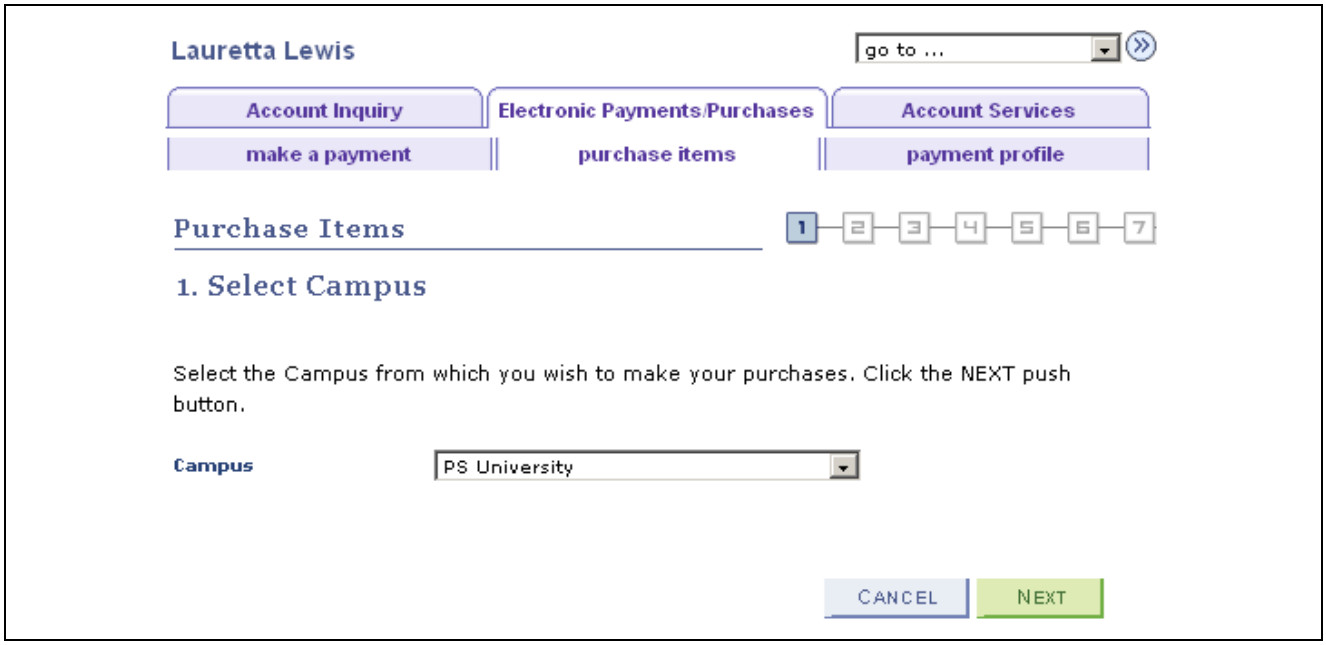
Page Name	Definition Name	Navigation	Usage
Electronic Payments/Purchases - Purchase Items - Payment Result	SSF_SS_PMT_RESULT	Click the Submit button on the Purchase Items - Confirm Payment page.	View successful and declined payment results.

Purchasing Miscellaneous Items

Access the Electronic Payments/Purchases - Purchase Items - Select Campus page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items, Select Campus).



Electronic Payments/Purchases - Purchase Items - Select Campus page

Selecting Items

Access the Electronic Payments/Purchases - Purchase Items - Select Items page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Campus and click the Next button).

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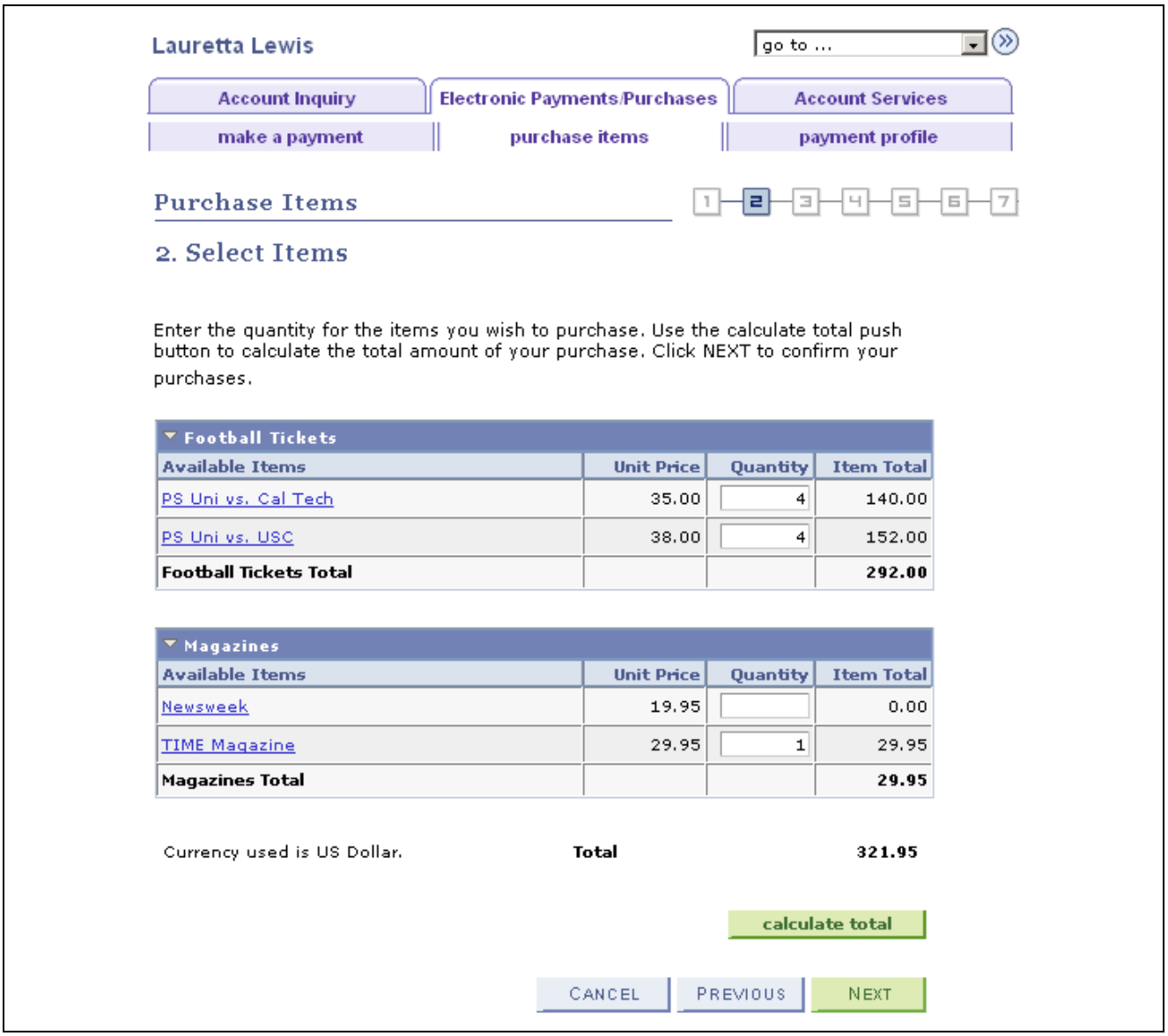

Electronic Payments/Purchases - Purchase Items - Select Items page

Students can make multiple transactions at one time. For term-based selections, current and future terms will appear in the grid. Expired terms (based on the term end date) or items that are not within the effective date and expiration date will not be available for selection.

If taxes (sales or GST) are included, a separate line item will appear after the Total line. A subtotal line appears after each grid for multiple entries in each category.

After selections are made, click the Calculate Total button.

If you click Cancel, the system exits the Miscellaneous Purchases page and accesses the Account Summary page.

Click Next to have the system display a purchase confirmation page.

Click Next again to begin the Make a Payment process.

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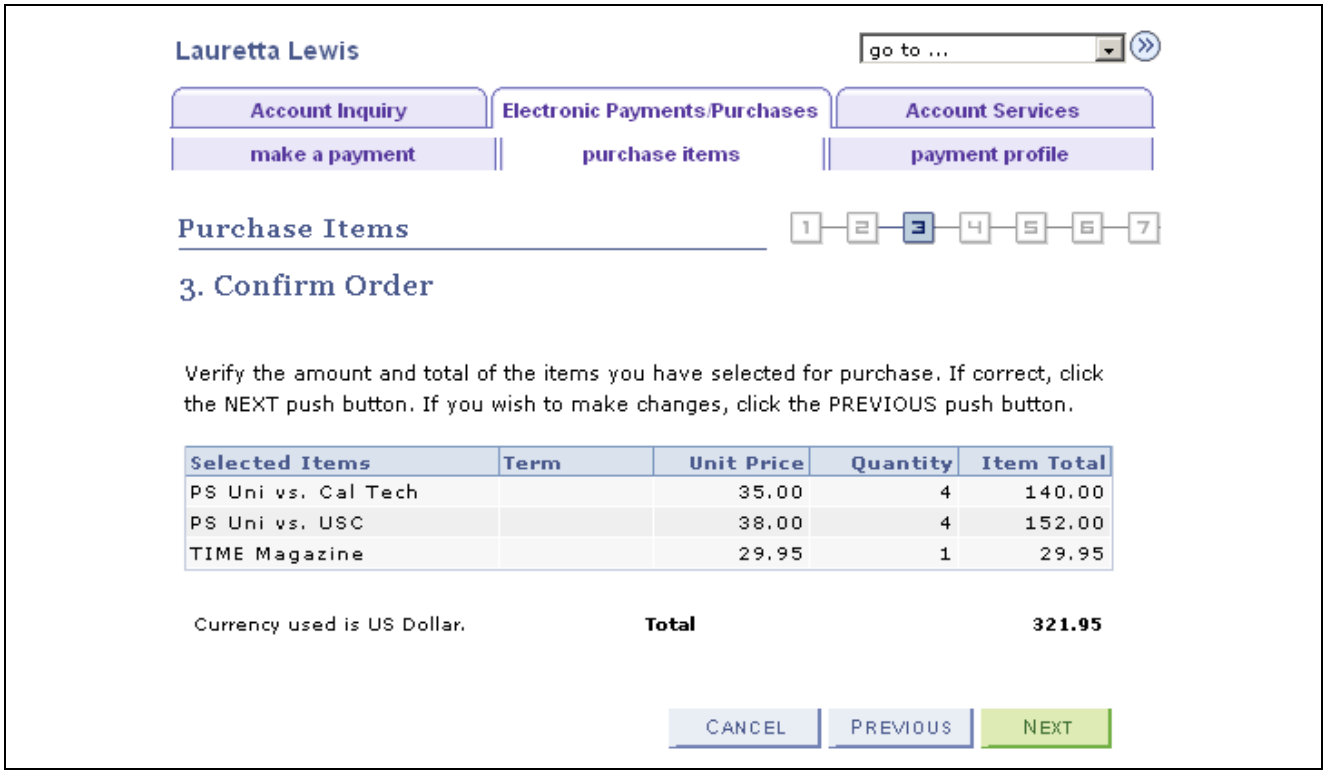
Confirming an Order

Access the Electronic Payments/Purchases - Purchase Items - Confirm Order page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Items and click the Next button).



Electronic Payments/Purchases - Purchase Items - Confirm Order page

This page provides a consolidated list of selections and a total of all items before beginning the Make a Payment process.

Click Next to proceed through the Make a Payment process.

Making a Payment

For information about making a payment for miscellaneous items, refer to the Making Self-Service Payments section earlier in this chapter.

Using Account Services

This section discusses how to:

- Set up and manage bank accounts.
- Enroll in direct deposit.
- Enroll in a payment plan.
- View the 1098-T form.

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- Receive the 1098-T form online.
- Complete the 1098-T consent agreement.
- Receive the 1098-T consent confirmation.
- View student permissions.
- Select the permission form.
- Grant permission using the form agreement.
- Confirm student permission.
- View student permission agreement.

Pages Used for Account Services

Bundle 30. Added new page: Bank Location and Currency

Page Name	Definition Name	Navigation	Usage
My Bank Accounts	SSF_SS_BANK_VW	Self Service, Campus Finances, Manage My Bank Accounts, My Bank Accounts	View existing bank account details and access pages for adding and editing bank account details.
Manage My Bank Accounts - Bank Location and Currency **Bundle 30. New**	SSF_SS_BANK_CNTRY	Click the Add Account button on the My Bank Accounts page.	Specify the country and currency of the bank account.
Manage My Bank Accounts - Add Bank Account Details	SSF_SS_BANK_DET	Click the Add Account button on the My Bank Accounts page. Click the Add Another Bank Account button on the My Direct Deposits - Bank Account Summary page.	Set up and edit bank accounts for direct deposit refunds.
Manage My Bank Accounts - Agreement	SSF_SS_BANK_SUB	Click the Next button on the Manage My Bank Accounts - Add Bank Account Details page.	Review the bank agreement.
Manage My Bank Accounts - Result	SSF_SS_BANK_RES	Click the Submit button on the Manage My Bank Accounts - Agreement page.	Confirm bank account details.
Manage My Bank Accounts - Delete, Enroll in Direct Deposit - Delete	SSF_SS_DELETE_BANK	Click the Delete icon on the My Bank Accounts - Bank Account Summary page. Click the Delete icon on the Enroll in Direct Deposit - Modify Direct Deposit page.	Delete bank accounts and direct deposits.
Manage My Bank Accounts - Cancel, Enroll in Direct Deposit - Cancel	SSF_SS_CONFIRM	Click the Cancel button during the Manage my Bank Accounts or Enroll in Direct Deposit process.	Cancel an action during the Manage my Bank Accounts or Enroll in Direct Deposit process.

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Page Name	Definition Name	Navigation	Usage
My Direct Deposits	SSF_SS_DIRDEP_VW	Self Service, Campus Finances, Enroll in Direct Deposit, My Direct Deposits Select *Enroll in Direct Deposit* from Student Center. Click the Enroll in Direct Deposit link on the Manage My Bank Accounts - Result page.	Access the first step in the enroll in direct deposit process or access the pages to edit existing distributions.
My Direct Deposits - Bank Account Summary	SSF_SS_DIRDEP_CONF	Click the Enroll in Direct Deposit button on the My Direct Deposits page.	Review the bank accounts that are set up for direct deposit refund distributions and continue to the next step of the enroll in direct deposit process.
Enroll in Direct Deposit - Add Direct Deposit	SSF_SS_DIRDEP_BNK	Click the Proceed to Enroll in Direct Deposit button on the My Direct Deposits - Bank Account Summary page.	Set up direct deposit distribution details.
Enroll in Direct Deposit - Agreement	SSF_SS_DIRDEP_SUB	Click the Next button on the Enroll in Direct Deposit - Add Direct Deposit page.	Review the direct deposit agreement.
Enroll in Direct Deposit - Result	SSF_SS_DIRDEP_RES	Click the Submit button on the Enroll in Direct Deposit - Agreement page.	Confirm direct deposit details.
Account Services - Enroll in Payment Plan - Select Payment Plan	SSF_SS_PPL_SEL	• Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan • Access step 1 of the Payment Plan Wizard.	Select a payment plan.
Account Services - Enroll in Payment Plan - Review Installments	SSF_SS_PPL_CALC	• Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan Click the Next button. • Access step 2 of the Payment Plan Wizard.	Change the installment amount, number of installments, or both.
Account Services - Enroll in Payment Plan - Agreement	SSF_SS_PPL_SUBMIT	• Self Service, Campus Finances, Enroll in Payment Plan - Review Installments Click the Next button. • Access step 3 of the Payment Plan Wizard.	Review the terms of the payment plan before enrolling in the plan.

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Page Name	Definition Name	Navigation	Usage
Account Services - Enroll in Payment Plan - Agreement	SSF_SS_PPL_RESULT	• Self Service, Campus Finances, Enroll in Payment Plan - Agreement Click the Next button. • Access step 4 of the Payment Plan Wizard.	Review the terms of the payment plan before enrolling in the plan.
Account Services - 1098T Tax Form	SSF_SS_1098_SEL	• Self Service, Campus Finances, Account Services - View 1098-T • Access step 1 of the View 1098-T Wizard.	Indicate which tax year to view.
1098-T Consent Agreement	SSF_SS_1098_RESULT	• Self Service, Campus Finances, Account Services - View 1098-T, 1098-T Consent Agreement Click the Submit button. • Access step 2 of the View 1098-T Wizard.	Capture 1098-T consent confirmation.
Account Services - Student Permissions	SSF_SS_PERM_VIEW	Self Service, Campus Finances, View Student Permissions	View student permissions.
Student Permissions - Select Permission Form	SSF_SS_PERM_SEL	• Self Service, Campus Finances, View Student Permissions Click the Grant Permissions button. • Access step 1 of Student Permissions selection.	Select the desired permissions form.
Student Permissions - Permission Form Agreement	SSF_SS_PERM_SUBMIT	• Self Service, Campus Finances, View Student Permissions, Student Permissions - Select Permission Form Click the Next button. • Access step 2 of Student Permissions selection.	Read and agree to the selected permissions form.
Student Permissions - Student Permission Confirmation	SSF_SS_PERM_RESULT	• Self Service, Campus Finances, View Student Permissions, Student Permissions - Permission Form Agreement Click the Submit button. • Access step 3 of Student Permissions selection.	Receive student permission confirmation.

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Page Name	Definition Name	Navigation	Usage
Student Permission Agreement	SSF_SS_PERM_VW_SEC	• Self Service, Campus Finances, View Student Permissions Click the Display Student Agreement link. • Access step 4 of Student Permissions selection.	Review the student permission agreement.

Setting Up and Managing Bank Accounts

Bundle 30. This feature is available regardless of the AP Refunding Option that is set on the SF Installation page and refunding method used.

Students use the My Bank Accounts pages to set up and manage bank accounts.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords].

See [PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook - Update 1, Setting Up Student Financials Self Service, Setting Up Institution Sets].

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1, Setting Up Refunding, Setting Up Your Business Unit to Refund Customers].

Understanding the My Bank Accounts Page

Whether a student is setting up a bank account for the first time or has previously set up an account and wants to edit that account or add another account, the My Bank Accounts page is always the first page that a student sees. This page is known as the landing page for student bank accounts.

After a student adds at least one account, the page is called the My Bank Accounts - Bank Account Summary page.

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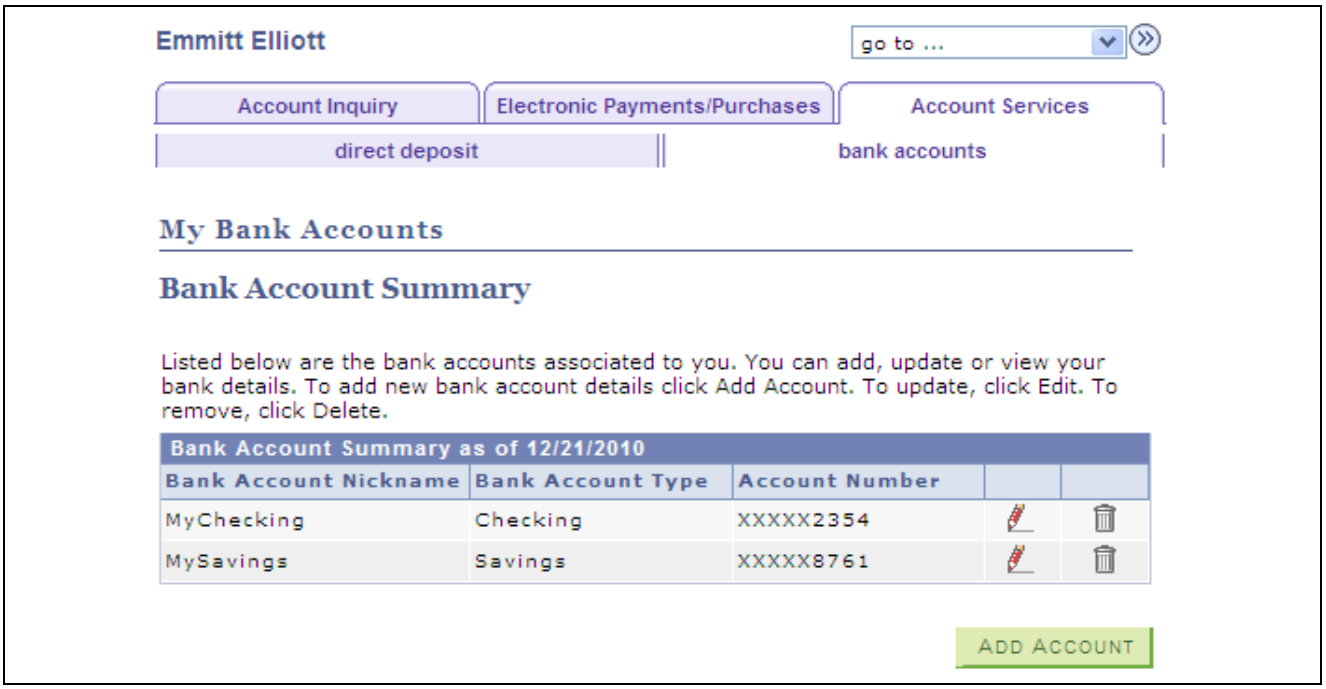
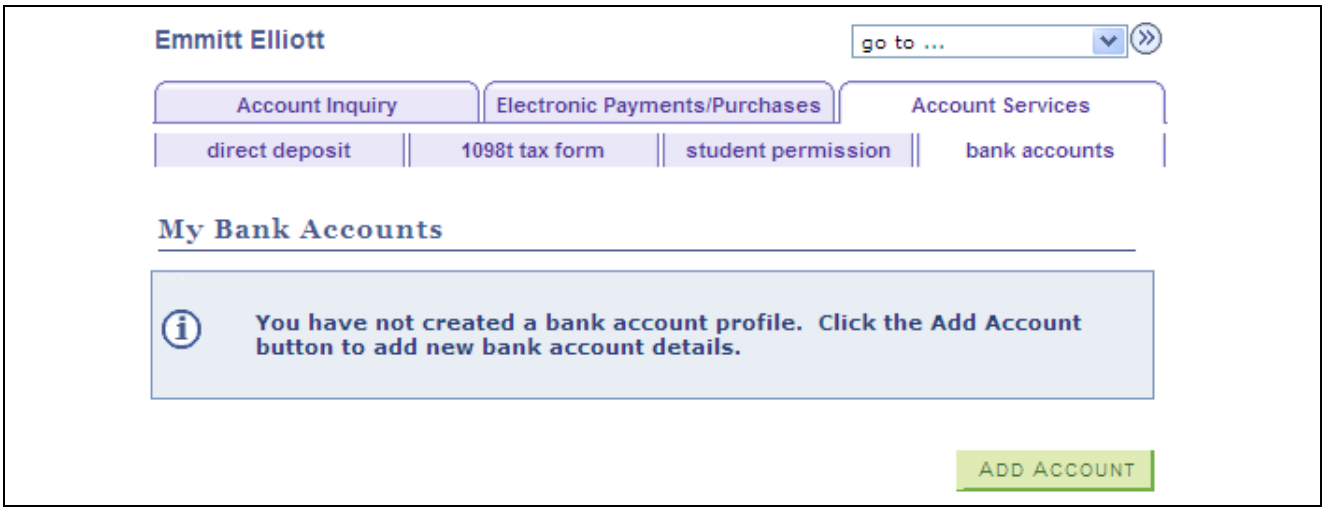


My Bank Accounts (Bank Account Summary) example page

Only active bank accounts are displayed on this page. Students can view, edit, and delete bank account details from this landing page.

Before a student sets up a bank account, this is how the page appears:



My Bank Accounts example page

Adding a Bank Account

Access the Manage My Bank Accounts - Add Bank Account Details page (click the Add Account button on the My Bank Accounts page).

Bundle 30. New page: Bank Location and Currency

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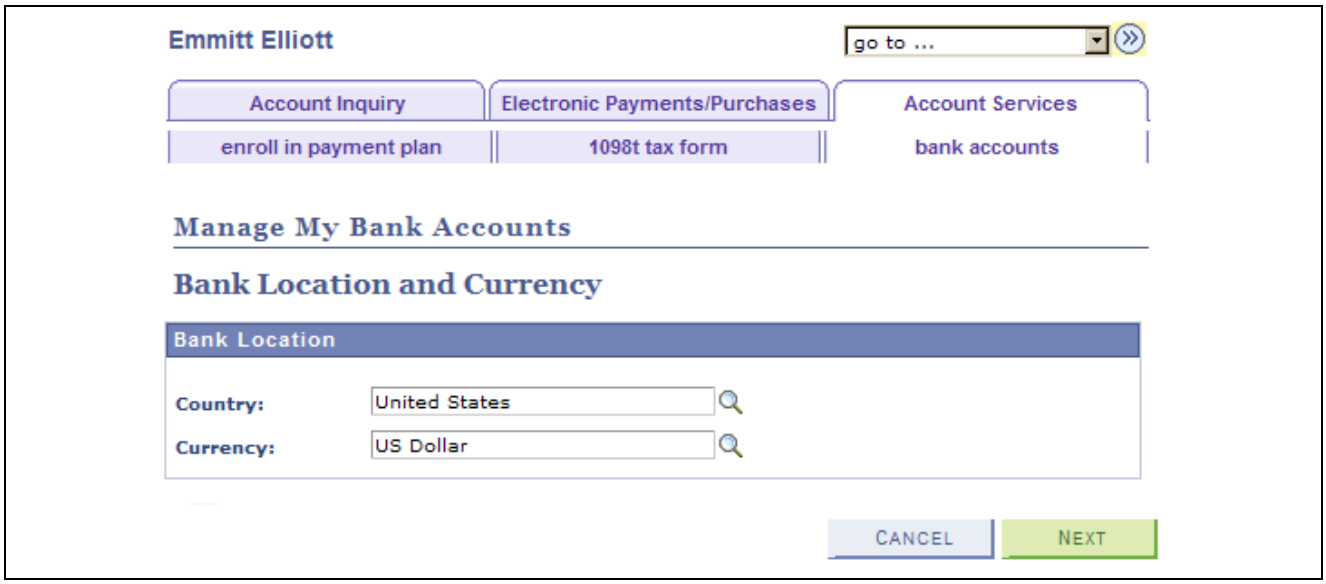

Bank Location and Currency page

Students access this page from the My Bank Accounts (landing) page. This page appears only if the Allow Change in Country check box is selected on the SF Institution – General Options page.

Country	If a country is not selected, the default value from the HRMS installation setup is retrieved.
Currency	If a currency is not selected, the default value from the HRMS installation setup is retrieved.
Next	Click to access the Add Bank Account Details page.

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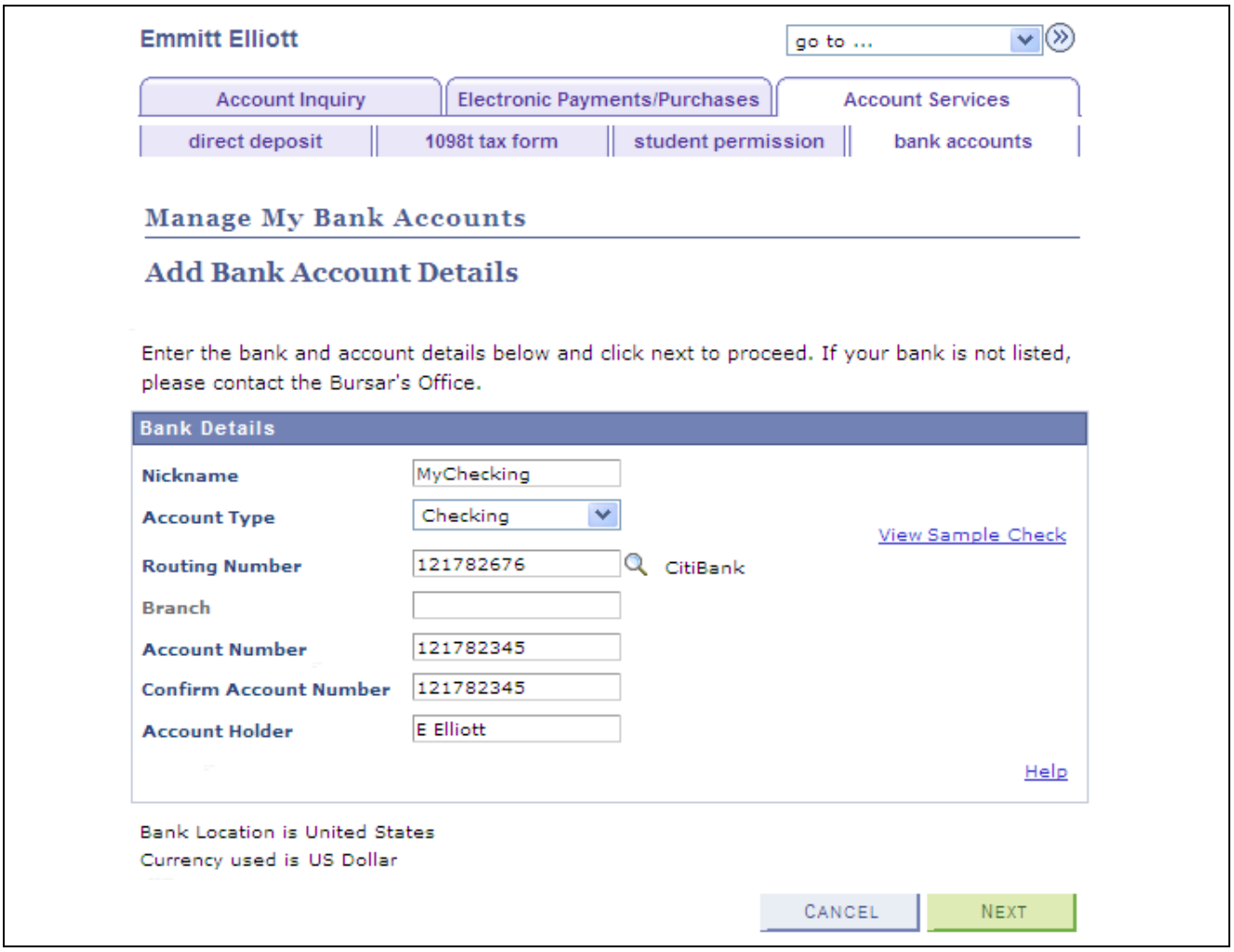

Manage My Bank Accounts - Add Bank Account Details page

If the Bank Location and Currency page is not enabled, students access this page from the My Bank Accounts (landing) page. Students also access this page if they set up direct deposit distributions (using Enroll in Direct Deposit) but have not yet set up a bank account.

When students set up or modify a bank account, data is inserted in the 3C trigger table with the Bank Event ID and institution to facilitate communication using 3C and the Comm Gen process. The Bank Event ID and institution are derived from the SF Installation setup only if the Bank Event ID is populated. Also, when students modify a bank account, only the Nickname field can be edited. The other fields are view-only.

The bank details on this page are validated according to the validation procedures in HRMS. To prevent duplicate bank accounts, the system checks that the combination of EmplID, Routing Number, Branch, and Account Number is unique.

If students are able to set the country and currency for their bank, the fields that appear here are based on the country they select.

Nickname Enter an alias for the bank account.

The nickname appears instead of the bank account name when the student enrolls in direct deposit.

Account Type By default, *Checking* is selected.

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Routing Number Select a routing number. The available values are based on the bank details record in HRMS.

Branch The values for this field depend on the routing number, and are based on the bank details record in HRMS.

Account Number Enter an account number.

For security reasons, only the last four digits of the account number appears after the student saves the page. The account number is also encrypted and stored in the database.

Confirm Account Number The value in this field must match the value in the Account Number field. Also, if the account number is modified, this field is enabled and the same account number must be provided.

This field does not appear when a value is entered in the IBAN field.

Account Holder Enter the account holder name as it appears on the bank account.

Check Digit Enter the two-digit number after the first two-letter country code of the IBAN.

This field appears based on the country code.

IBAN and **BIC Code** If the IBAN is provided, then the BIC Code must also be provided.

Student Financials uses the information in the HRMS IBAN Country Setup page to perform the required validation and prompt for values in the lookups.

- If IBAN is not enabled and not required, or the country is not defined on the IBAN Country Setup page, the IBAN and BIC Code fields do not appear.
- If IBAN is enabled but not required, provide values in the other bank information fields. The information is saved, and the IBAN and BIC Code are stored as blank.

  When bank details are derived from the IBAN and BIC setup, the details appear as view-only.

  For example, if the student enters an IBAN value of *NL51ABNA0401396312*, the BIC Code becomes required. The BIC Code values that are available are all those for the country NLD, which are based on the IBAN value (the first 2 digits are always the country and the next 2 digits are always the IBAN check digit). The student selects a BIC Code of *ABNANL2A* (this is an available value because it is set up on the Bank Branch Setup table in HR). The Routing Number and Branch fields are populated and are view only—with the values *0150681* (BankID already set up for ABN Amro) and *ABNANL2* (Branch ID) respectively. The Bank Name and Branch Name also appear.
- If IBAN is enabled and required, a value for IBAN and BIC Code must be provided.

  The Account Number field is populated based on the IBAN value and appears as view-only. The other standard bank fields are view-only.

For security reasons, only the last four digits of the IBAN appear after the page is saved.

See *PeopleSoft HRMS Application Fundamentals PeopleBook*, Setting Up Banks and Bank Branches.

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View Sample Check Click to view a sample image of a check in a new window. This link appears only for the United States (USA) and Canada (CAN).

Help Click to open a Help page in a new window. The URL that is selected in the Help URL field in the Manage Bank Options group box on the SF Institution Set - General Options page is used here. If that setup is not done, the link does not appear here.

Next Click to go to the Agreement or Confirmation page.

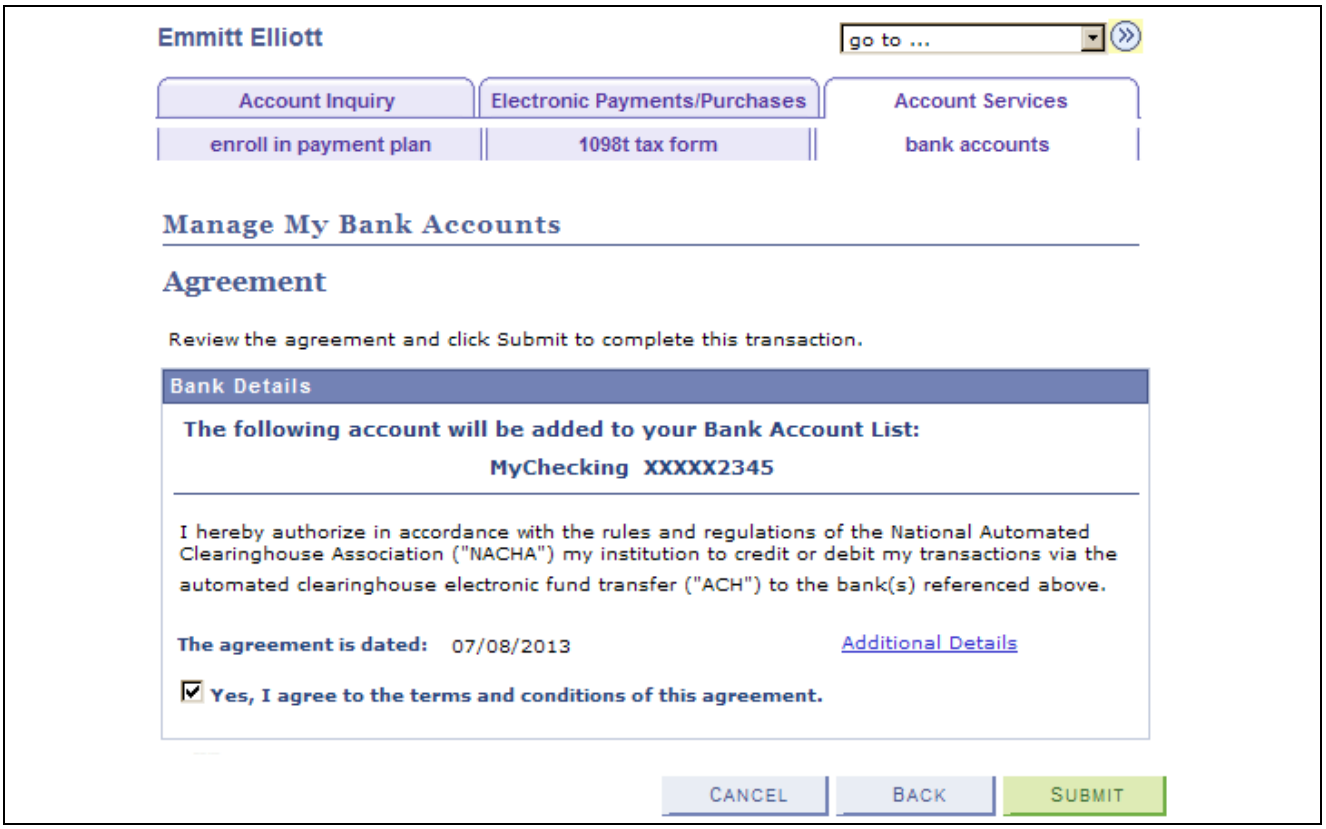
The Agreement page appears if the first bank account is being created, otherwise the Confirmation page appears if there are no validation errors.

Note. For further information about this page, refer to the documentation about the related administrative component.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1, Setting Up Refunding, Setting Up and Managing Bank Accounts for AP Direct Deposit Refunding].

Reviewing the Bank Agreement

Access the Manage My Bank Accounts - Agreement page (click the Next button on the Manage My Bank Accounts - Add Bank Account Details page).



Manage My Bank Accounts - Agreement page

This page appears only:

- if the Display Agreement check box is selected in the Manage Bank Options group box on the SF Institution - General Options page.

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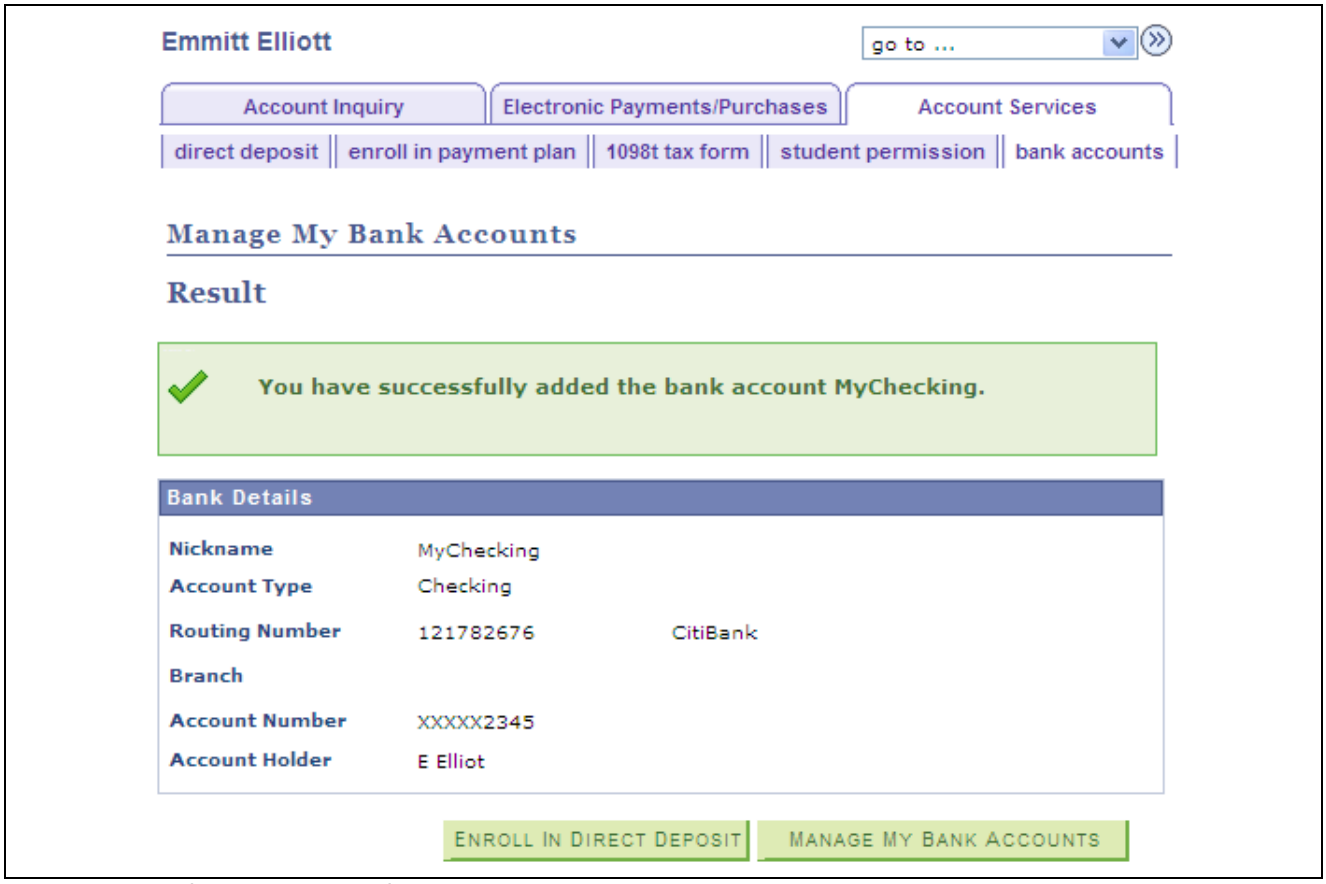
- once, when the first bank account is created.

Yes, I agree to the terms and conditions of this agreement.	Select to be able to save bank details.
Submit	Click to save bank details and go to the Manage My Bank Accounts – Result page. An agreement type of Bank Account is inserted into the Agreement table.
Additional Details	Opens a page in another window. The page that appears is derived from the URL that is specified in the Additional details URL field in the Manage Bank Options group box on the SF Institution Set - General Options page is used here. If the setup is not done, the link does not appear here.

Note. The bank agreement cannot be revoked either by administrative staff or by students. The agreement remains in the table even if all bank account details are deleted or made inactive.

Confirming Bank Account Details

Access the Manage My Bank Accounts - Result page (click the Submit button on the Manage My Bank Accounts - Agreement page).



Manage My Bank Accounts - Result page

Enroll in Direct Deposit	Click to access the My Direct Deposit pages and set up distributions for direct deposit refunds.

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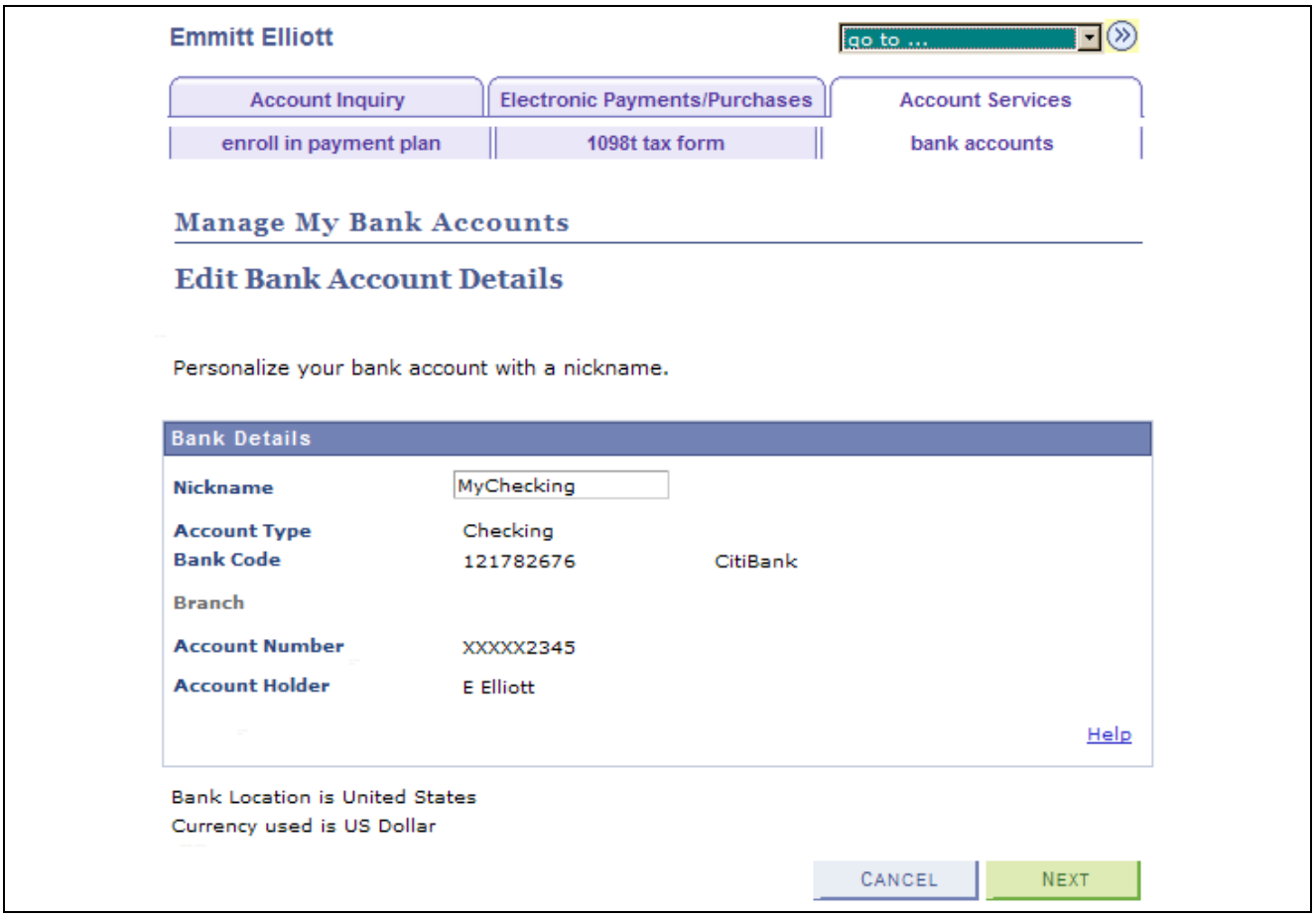
This button appears only if AP Refunding Option is set to *Use Single Payment Voucher* on the SF Installation page.

Manage My Bank Accounts Click to access the landing page (My Bank Accounts - Bank Account Summary page) from which additional bank accounts can be added, or existing bank accounts can be edited or deleted.

When students create a bank account or edit bank account details, they receive an email notification based on the Event ID set up on the SF Installation page.

Modifying a Bank Account

Click the Edit icon on the My Bank Accounts – Bank Account Summary page.



Edit Bank Account Details page

The Nickname field is the only field that can be edited. The other fields are view-only.

When students modify a bank account, data is inserted in the 3C trigger table with the Bank Event ID and institution to facilitate communication using 3C and the Comm Gen process. The Bank Event ID and institution are derived from the SF Installation setup only if the Bank Event ID is populated.

Next Click to go to the Manage My Bank Accounts - Result page.

Deleting a Bank Account

Click the Delete icon on the My Bank Accounts – Bank Account Summary page.

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When a student deletes a bank account, the bank account status is set to *Inactive*. To delete a bank account for which a direct deposit distribution is set up, students must first deactivate the direct deposit distribution.

When students delete a bank account, data is inserted in the 3C trigger table with the Bank Event ID and institution to facilitate communication using 3C and the Comm Gen process. The Bank Event ID and institution are derived from the SF Installation setup only if the Bank Event ID is populated.

Enrolling in Direct Deposit

Students use the My Direct Deposit pages to specify how direct deposit refunds are distributed across their bank accounts.

Students can access the Direct Deposit feature in Self Service only if:

- Use Single Payment Voucher is selected as the AP Refunding Option on the SF Installation page.
- The Direct Deposit Enrollment check box is selected on the SF institution Set - General Options page.
- *A/P* is selected in the Refund Method field on the Refund Setup component of the SF Business Unit.
- The student does not have a negative service impact for Disable Manage My Banks on the SF Institution Set - Business Units page.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords].

See [PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook - Update 1, Setting Up Student Financials Self Service, Setting Up Institution Sets].

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1, Setting Up Refunding, Setting Up Your Business Unit to Refund Customers].

See: Addendum: Direct Deposit Through AP Refunding.pdf which is posted to My Oracle Support as part of Additional Features January 2011

Understanding the My Direct Deposits Page

Whether a student is enrolling in direct deposit for the first time or has previously set up direct deposit distributions and wants to edit them, the My Direct Deposits page is always the first page that a student sees. This page is known as the landing page for direct deposits.

After a student enrolls in direct deposit, the page is called the My Direct Deposits - Direct Deposit Summary page. Here is an example of the page:

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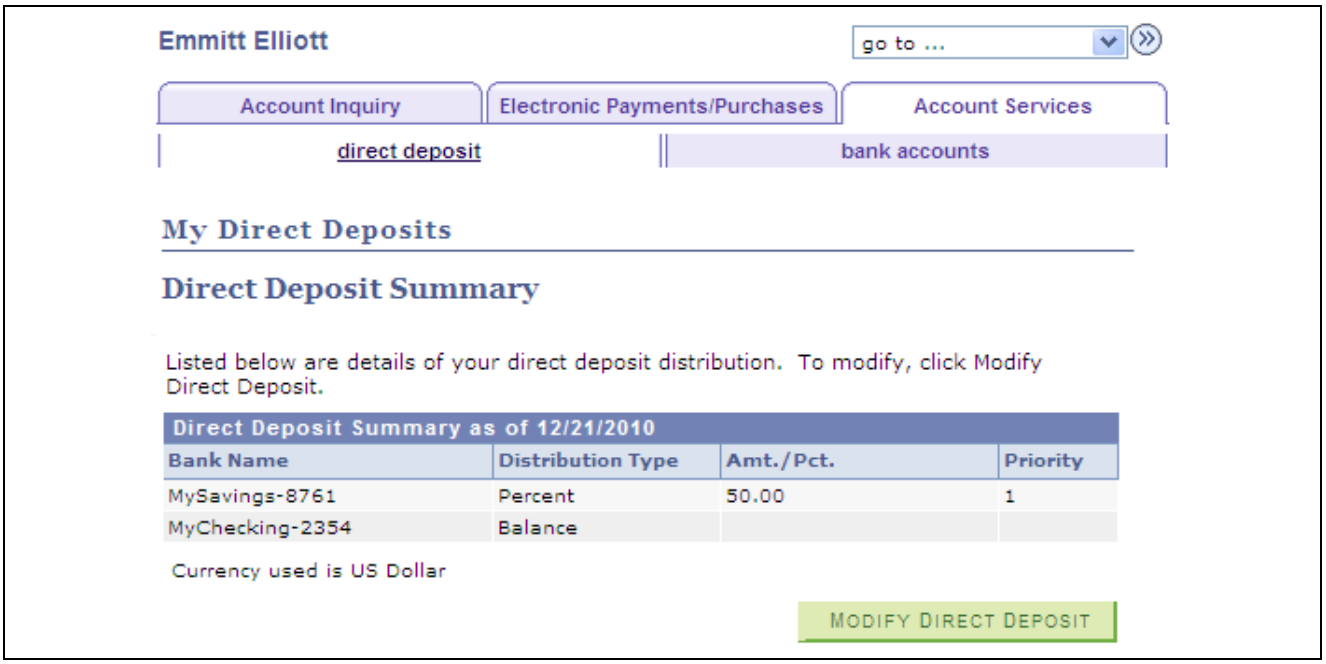
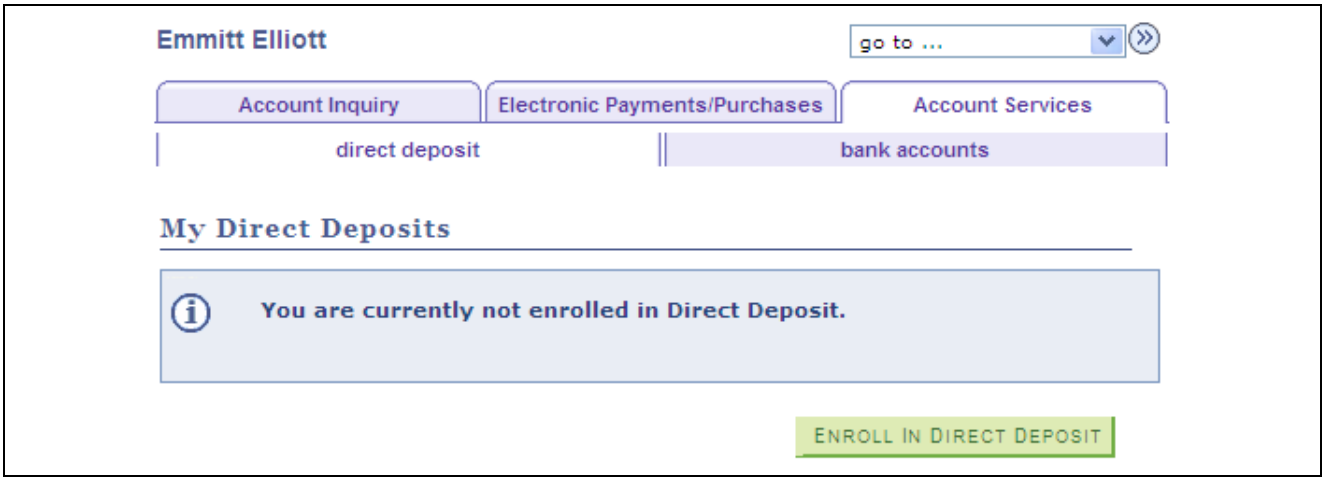


My Direct Deposits - Direct Deposit Summary example page

From this summary page, students can add more distributions and edit or delete their existing distributions by clicking the Modify Direct Deposit button.

Using the My Direct Deposits Page

Access the My Direct Deposits page (Self Service, Campus Finances, Enroll in Direct Deposit, My Direct Deposits).



My Direct Deposits page

This is how the landing page appears the first time that a student enrolls in direct deposit.

Enroll in Direct Deposit

To enroll in direct deposit, the student must have already set up at least one bank account.

If the student has set up at least one bank account, then when the student clicks the Enroll in Direct Deposit button, the student is taken to the next step of the process.

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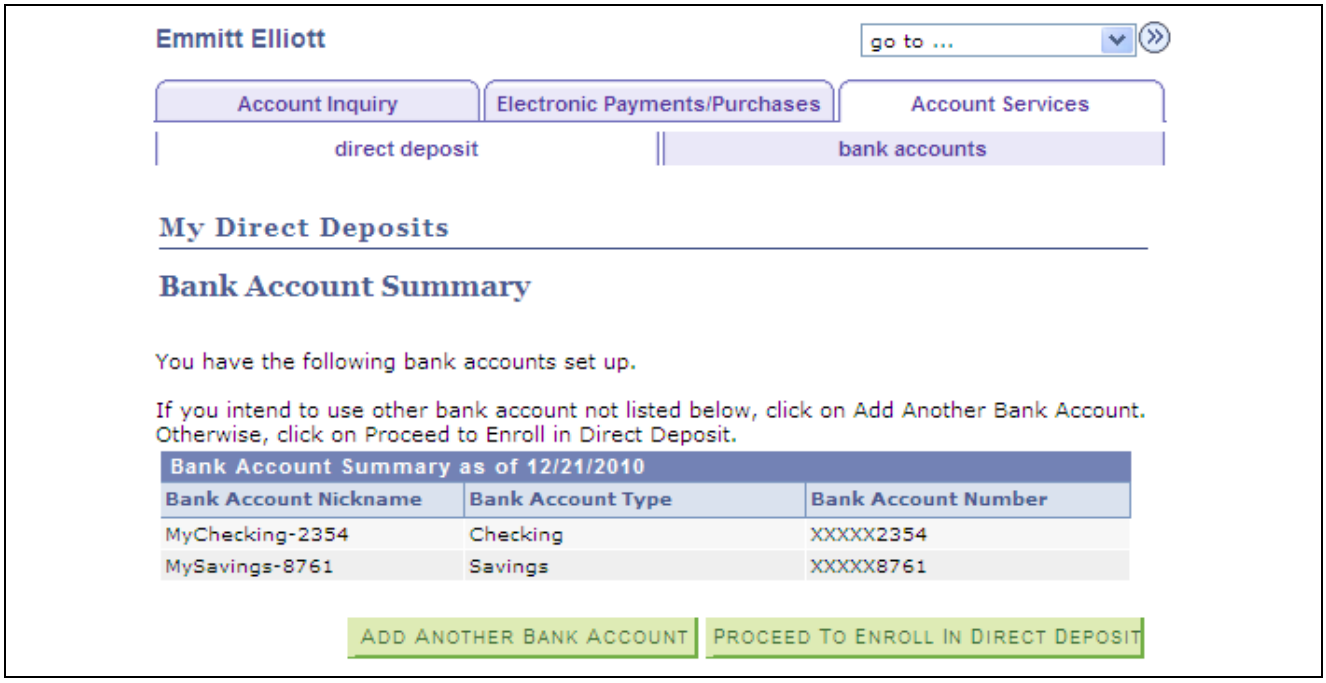
If the student clicks the Enroll in Direct Deposit button and has not set up a bank account, the Manage My Bank Accounts - Add Bank Account Details page appears. The student continues through the process of setting up one or more bank accounts. When the Manage My Bank Accounts - Result page appears, the student clicks the Enroll in Direct Deposit link on that page and then completes the direct deposit distribution set up.

For information about the Manage My Bank Accounts pages, refer to the previous documentation section: Setting Up Bank Accounts.

Reviewing Bank Accounts for Enrolling in Direct Deposit

Access the My Direct Deposits - Bank Account Summary page (click the Enroll in Direct Deposit button on the My Direct Deposits - Direct Deposit Summary page).



My Direct Deposits - Bank Account Summary page

For students who have set up bank accounts but have not enrolled in direct deposit, the page appears as in the example page shown above.

Students can view the bank accounts that can be used for refund distributions. Students can also add additional bank accounts.

Students then proceed to the next step in the enroll in direct deposit process from this page.

If students have set up bank accounts *and* enrolled in direct deposit, the Proceed to Enroll in Direct Deposit button is replaced with a Proceed to Modify Direct Deposit button.

Adding Direct Deposits

Access the Enroll in Direct Deposit - Add Direct Deposit page (click the Proceed to Enroll in Direct Deposit button on the My Direct Deposits - Bank Account Summary page).

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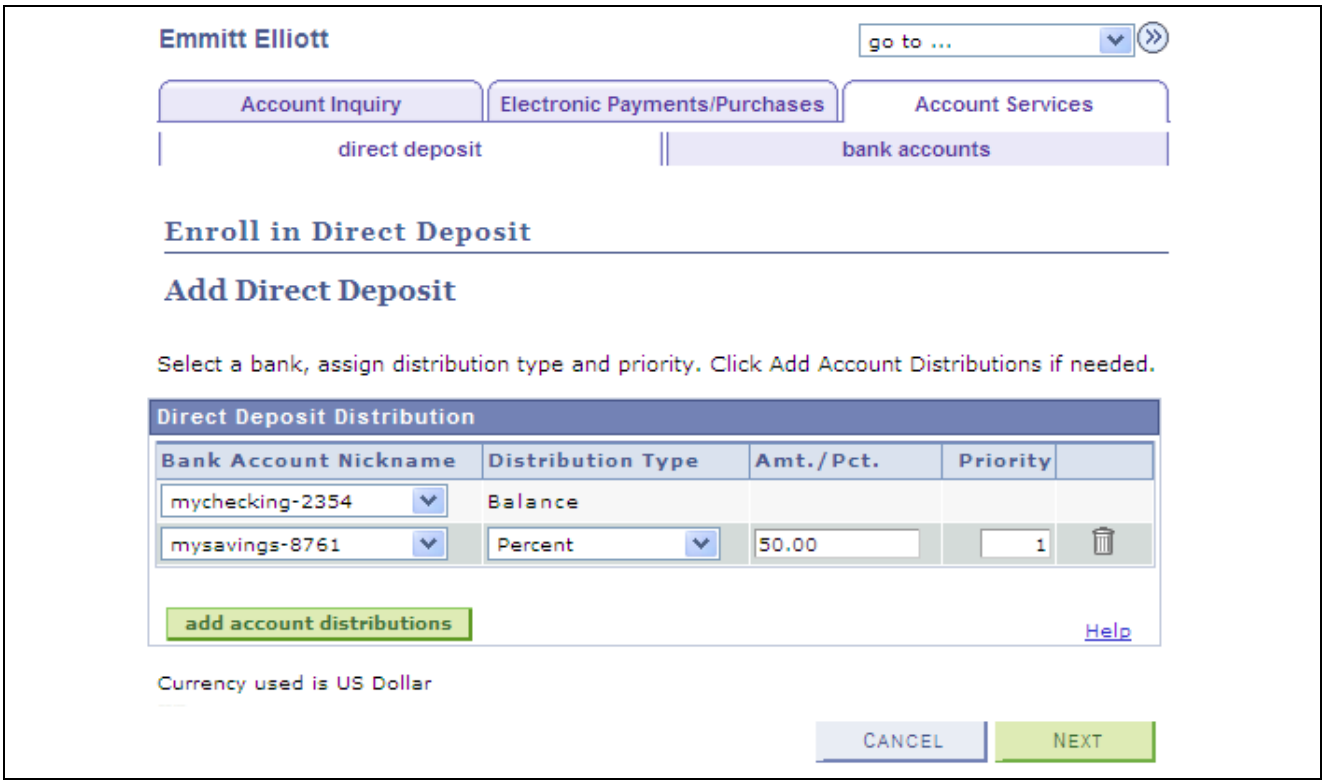

Enroll in Direct Deposit - Add Direct Deposit page

On this page, students specify how they want refunds distributed between bank accounts.

Bank Account Nickname

Students must enter a value in the Nickname field when they set up their bank accounts. That nickname, followed by the last 4 digits of the account number, appears here.

Note. Only one distribution per bank account (nickname) is allowed.

Distribution Type

Values are *Amount*, *Balance*, and *Percentage*.

One bank account must be assigned a distribution type of *Balance*.

If the maximum distribution allowed is 1 (based on the Maximum Distributions field on the SF Institution Set-General Options page) the only Distribution Type value available is *Balance*. The whole refund amount is disbursed to one account.

If multiple distributions are allowed and the student does not assign one account as *Balance*, an error appears on save.

Amt./Pct.
(amount/percentage)

This field is available only if the maximum distributions allowed is greater than 1.

The value that the student enters can include up to 2 decimal points—for example, 100.50 or 50.25.

This field is not available for entry if the Distribution Type is *Balance*.

Priority

The student enters a value to indicate the order in which bank accounts are selected when a refund is posted. The value must be a whole number.

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The lower the number, the higher the priority—for example, an account with value *1* is used first, then an account with value *2* is used next.

When the Distribution Type is *Balance*, the default value of the *Priority* field is *999* (the value is hidden) and the field is not available for entry.

add account distributions This button is available only if the maximum distributions allowed is greater than 1.

Help The student clicks this link to access the URL that you set up in the Direct Deposit Options group box on the SF Institution Set-General Options page. If the setup is not done, the link does not appear.

Delete When a record is deleted, the row is removed and all other rows are stamped with the current effective date and a new effective sequence number.

The Delete icon does not appear for the row with a Distribution Type of Balance.

Note. For further information about this page, refer to the documentation about the related administrative component.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1, Setting Up Refunding, Setting Up and Managing Direct Deposit Distributions for AP Refunding].

Reviewing the Direct Deposit Agreement

Access the Enroll in Direct Deposit - Agreement page (click the Next button on the Enroll in Direct Deposit - Add Direct Deposit page).

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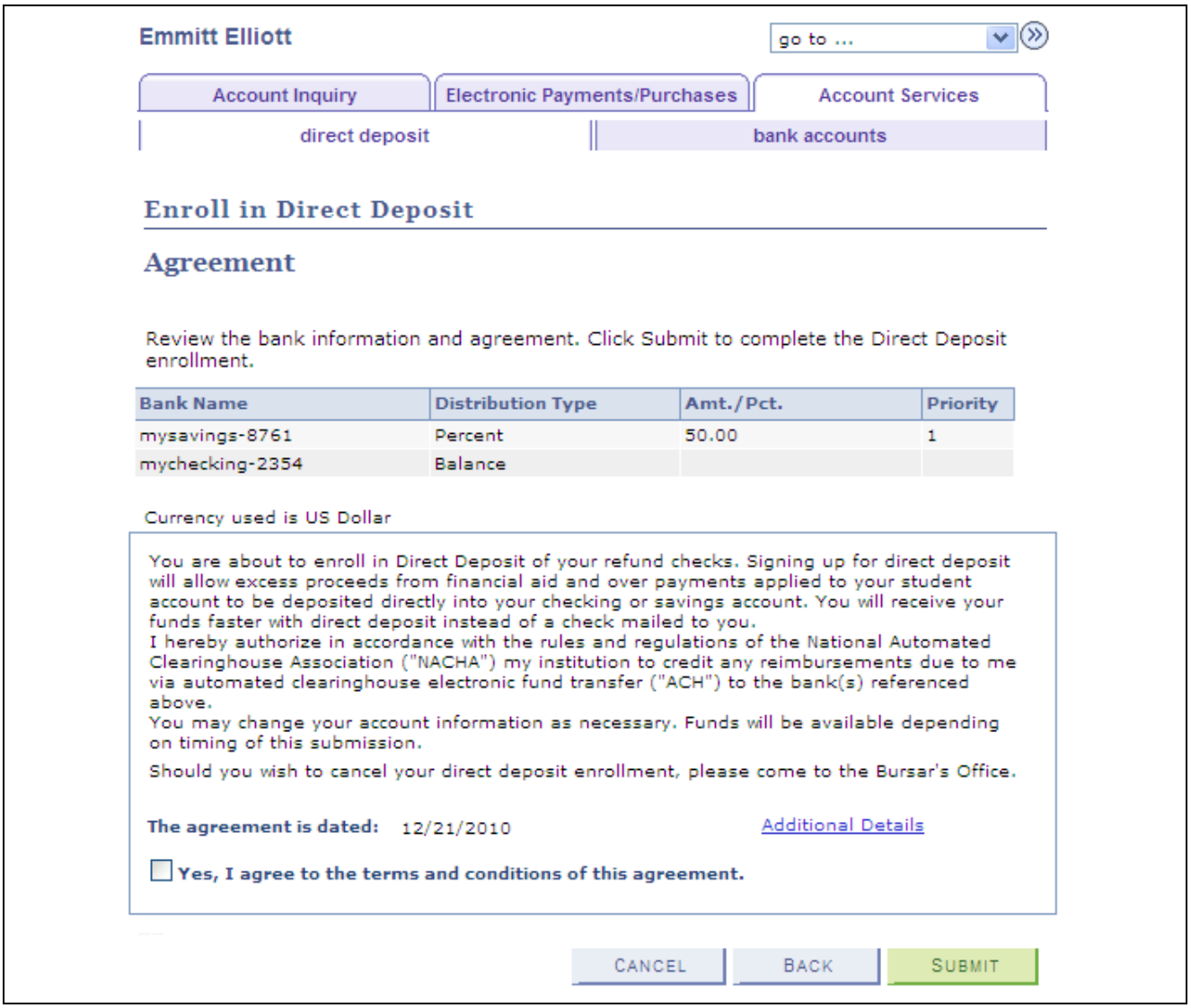

Enroll in Direct Deposit - Agreement page

This page appears automatically the first time that a student sets up direct deposit distributions.

When the student selects the check box and clicks the Submit button, an agreement type of DD Enroll is inserted into the Agreement table.

If the Display Subsequent Agreement check box is selected in the Direct Deposit Options group box on the SF Institution - General Options page, compliance text appears when the student edits direct deposit distributions.

When the student selects the check box and clicks the Submit button, an agreement type of DD Change is inserted into the Agreement table.

The student clicks the Additional Details link to access the URL that you set up in the Direct Deposit Options group box on the SF Institution Set-General Options page. If the setup is not done, the link does not appear.

Confirming Direct Deposit Details

Access the Enroll in Direct Deposit - Result page (click the Submit button on the Enroll in Direct Deposit - Agreement page).

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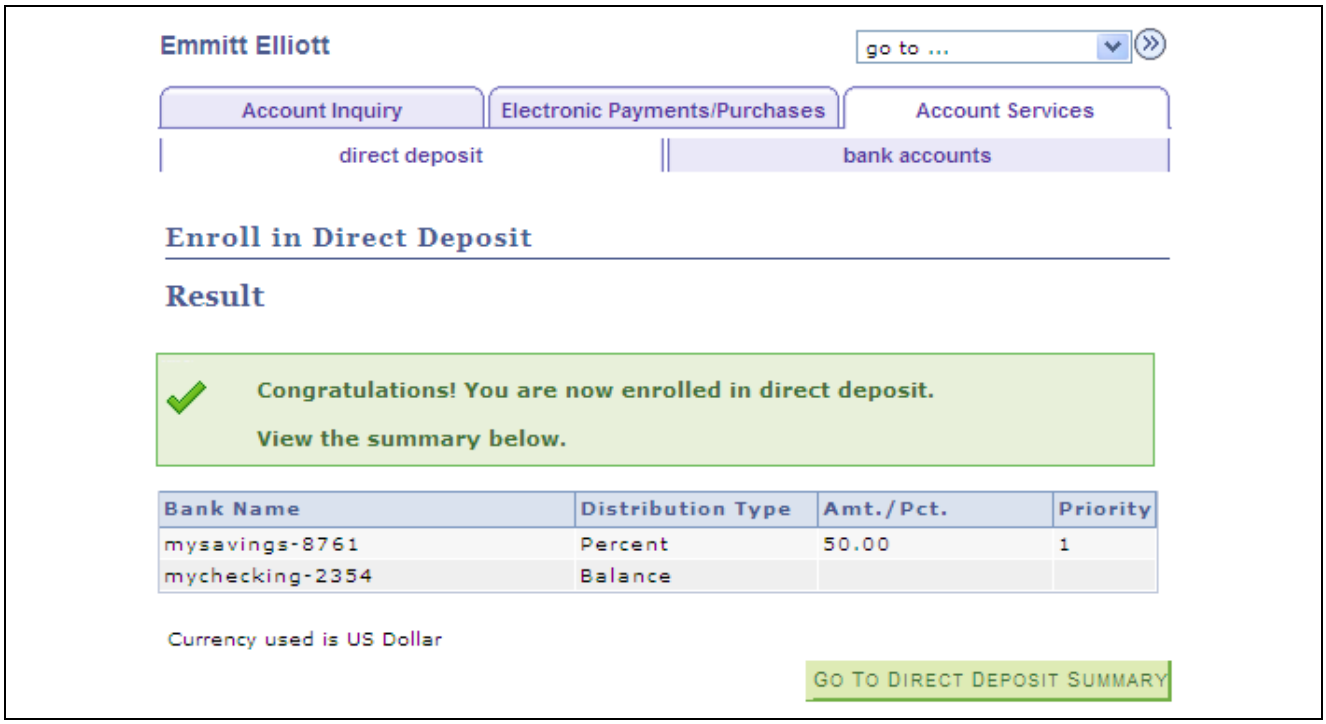

Enroll in Direct Deposit - Result page

Go To Direct Deposit Summary

The student click this button to access the My Direct Deposits - Direct Deposit Summary (landing) page.

You can view an example of the landing page earlier in this section.

From the landing page, students can access the My Direct Deposits - Modify Direct Deposit page where they can edit existing distributions, add more distributions, and delete distributions.

When a student enrolls in direct deposit or edits direct deposit distributions, an email notification is sent to the student based on Event ID setup on the SF Installation page.

Enrolling in a Payment Plan

Students can link their charges to a specified payment plan.

Select Payment Plan

Access the Account Services - Enroll in Payment Plan - Select Payment Plan page (Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan).

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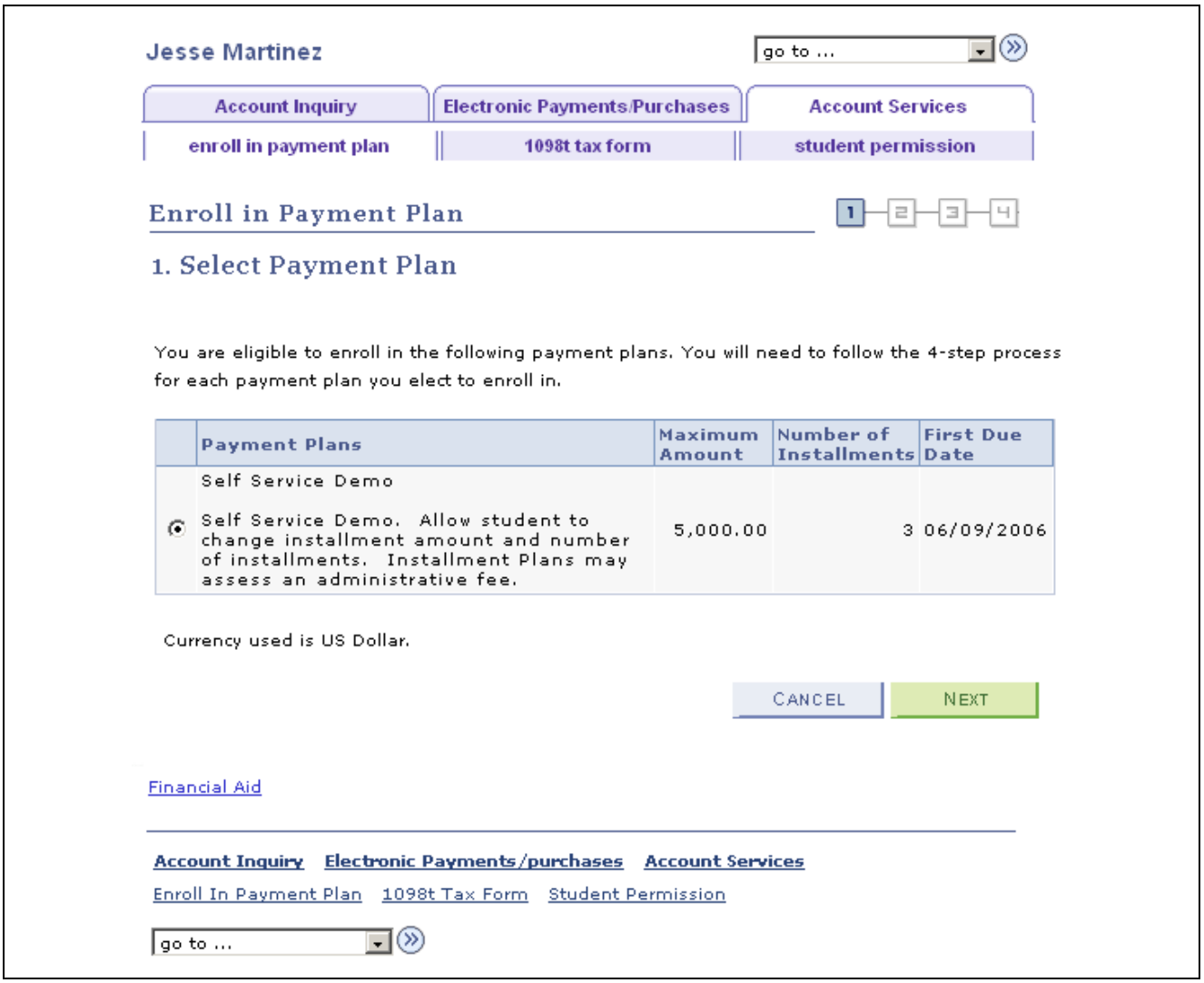

Account Services - Enroll in Payment Plan - Select Payment Plan page

This page enables students to select a payment plan from among all eligible payment plans.

Click a plan. The first line of the Plan Description is derived from the Payment Plan description. The text after the first line is derived from the Payment Plan setup - Self Service description.

Review Installments

Access the Enroll in Payment Plan - Review Installments page (Self Service, Campus Finances, Enroll in Payment Plan, Select Payment Plan and click the Next button).

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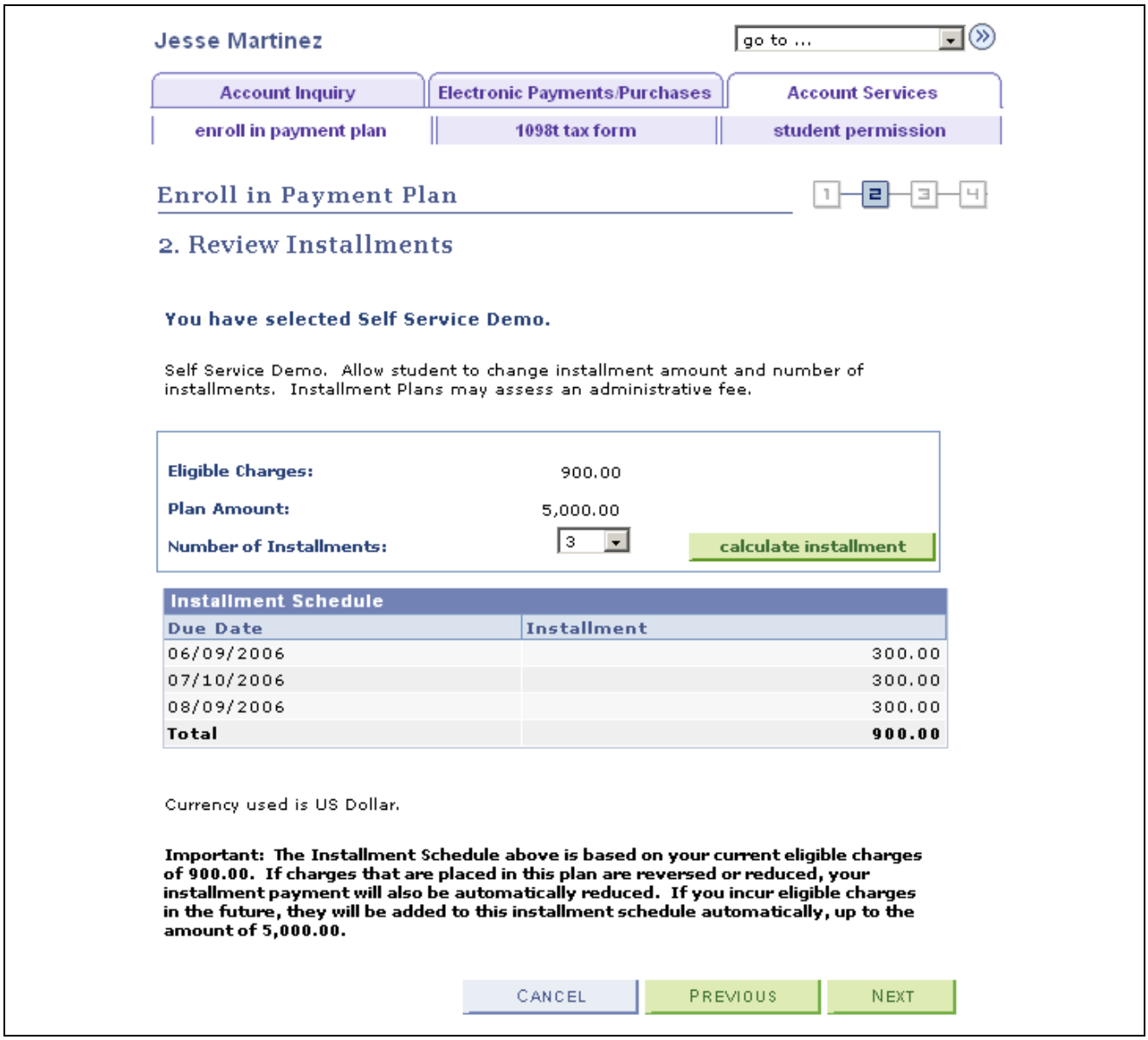

Account Services - Enroll in Payment Plan - Review Installments page

Agreement

Access the Enroll in Payment Plan - Agreement page (Self Service, Campus Finances, Enroll in Payment Plan - Review Installments and click the Next button).

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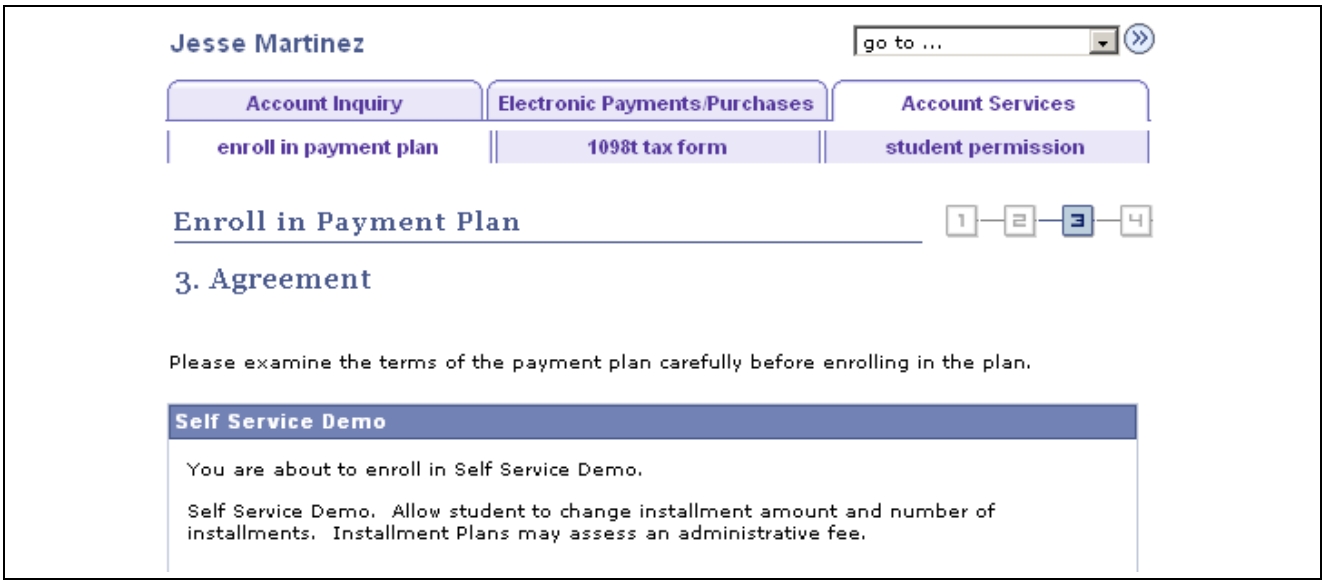
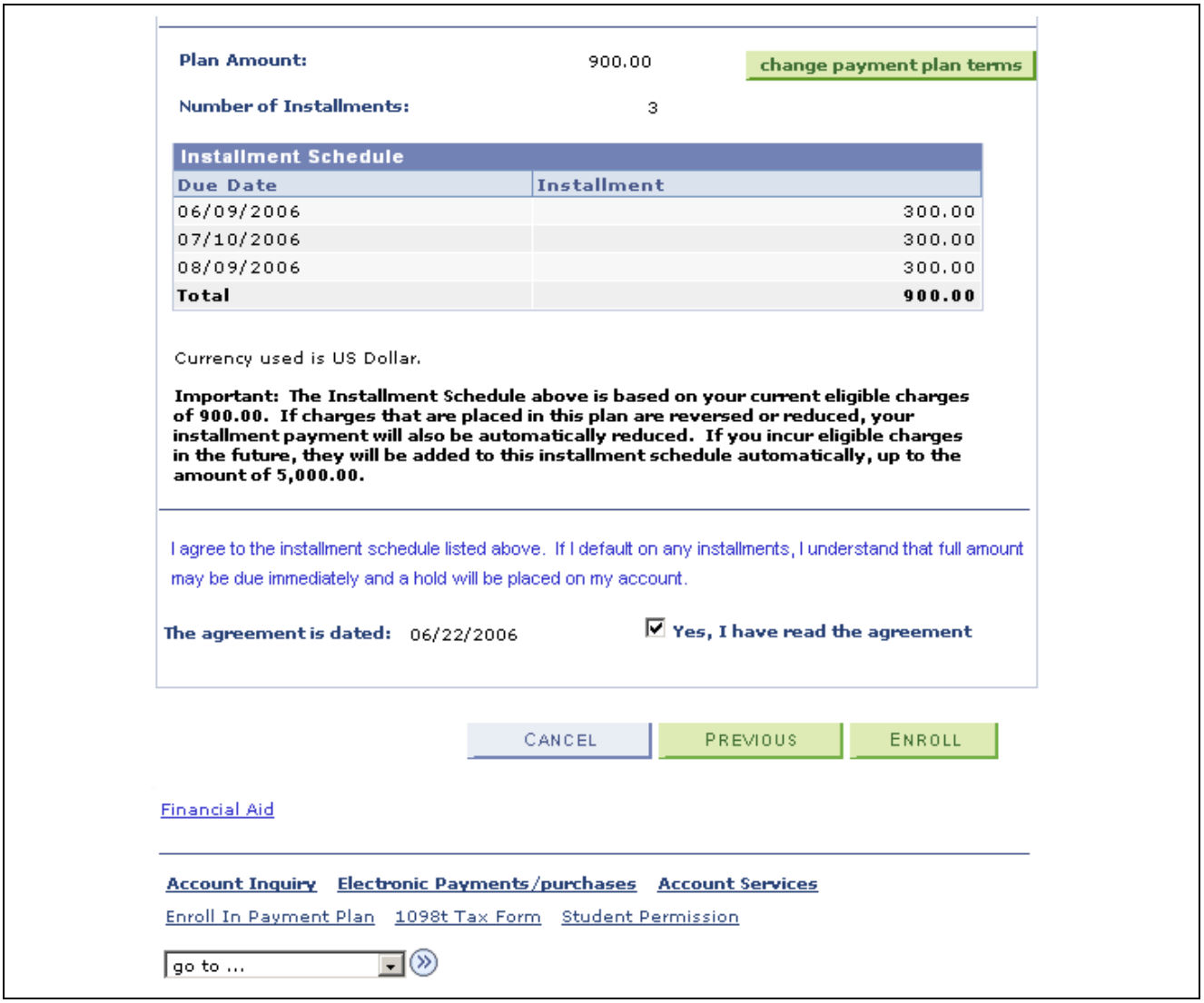


Account Services - Enroll in Payment Plan - Agreement page (1 of 2)



Account Services - Enroll in Payment Plan - Agreement page (2 of 2)

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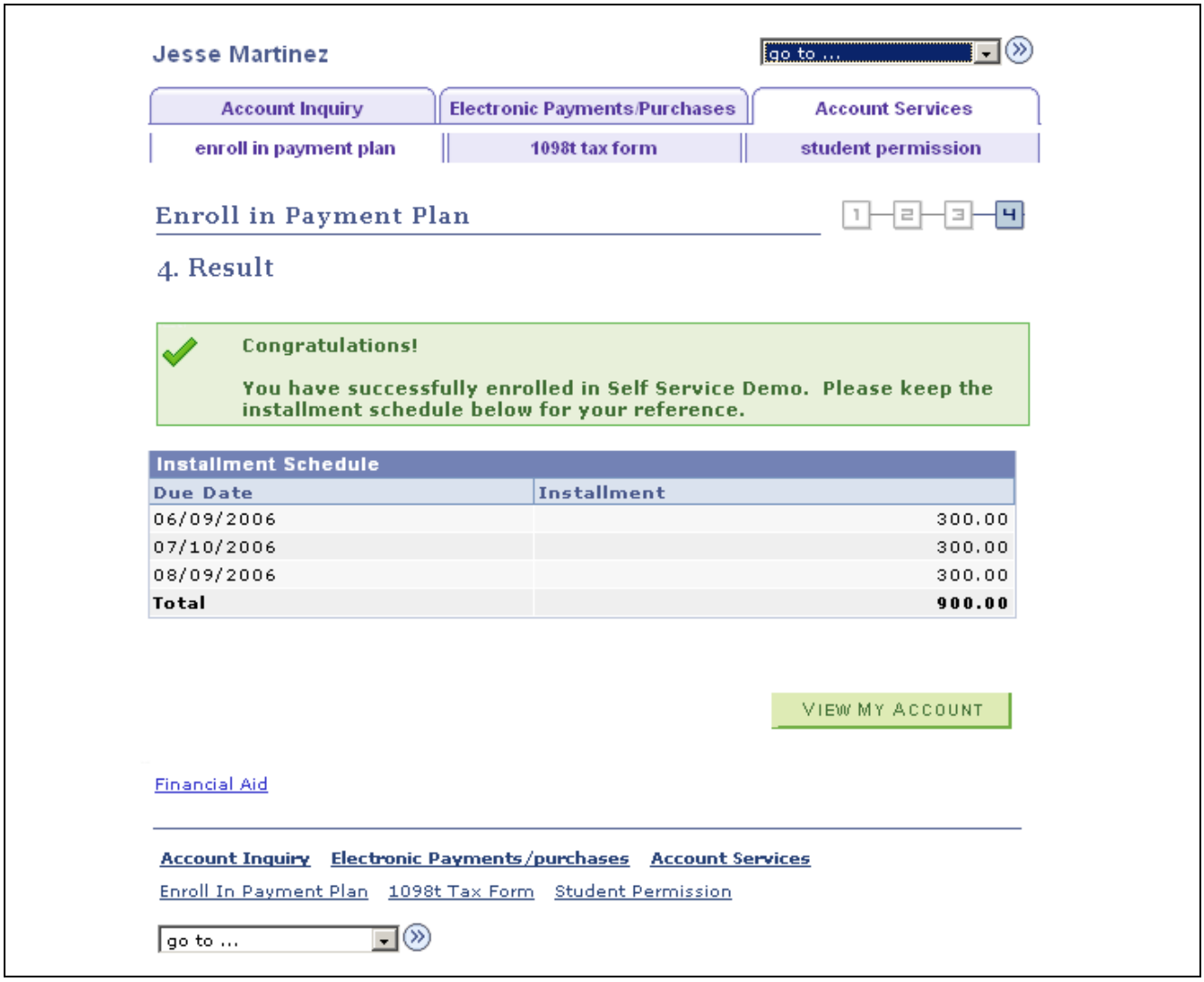
Administrators can use the Review Self Service Agreements page to view enrollment agreement data.

Results

Access the Account Services - Enroll in Payment Plan - Result page (Self Service, Campus Finances, Account Services - Enroll in Payment Plan - Agreement and click the Next button).



Account Services - Enroll in Payment Plan - Result page

Administrators can use the *Review Self Service Agreements* page to view enrollment agreement data.

Viewing the 1098-T Form

The 1098-T is an Internal Revenue Service (IRS) form that reports tuition and related expenses that a student can use to claim an educational tax credit.

Student Financials enables a student to view and reprint a substitute copy of the 1098-T after having received a paper copy through postal mail.

It also enables the student to consent to accessing an electronic version of the 1098-T form through the student self-service feature.

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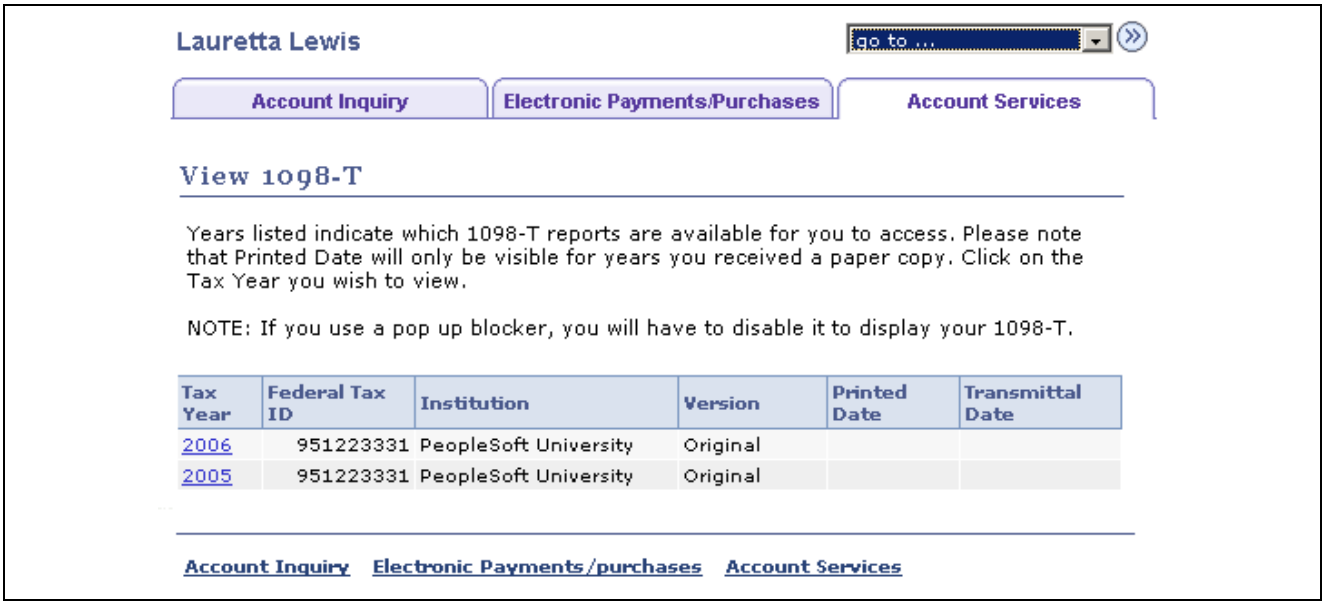
On the View 1098–T page, the Box Amount tab enables the student to access the details for individual box amounts.

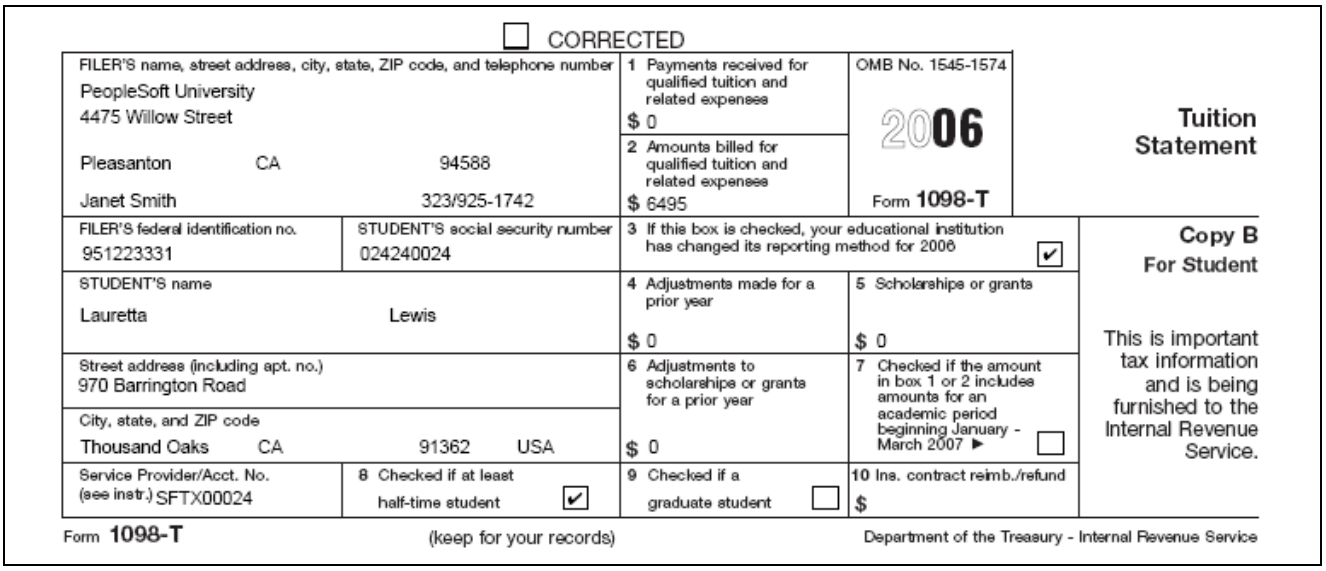
Access the Account Services - View 1098-T page (Self Service, Campus Finances, Account Services - View 1098-T).



Account Services - View 1098-T page

Select the tax year you want to view.

Access the 1098-T page.



1098-T page

Until you generate a 1098-T form for the current tax year, only previous years are available.

View 1098-T Amount Detail

Access the Account Services - View 1098-T, Box Amount tab.

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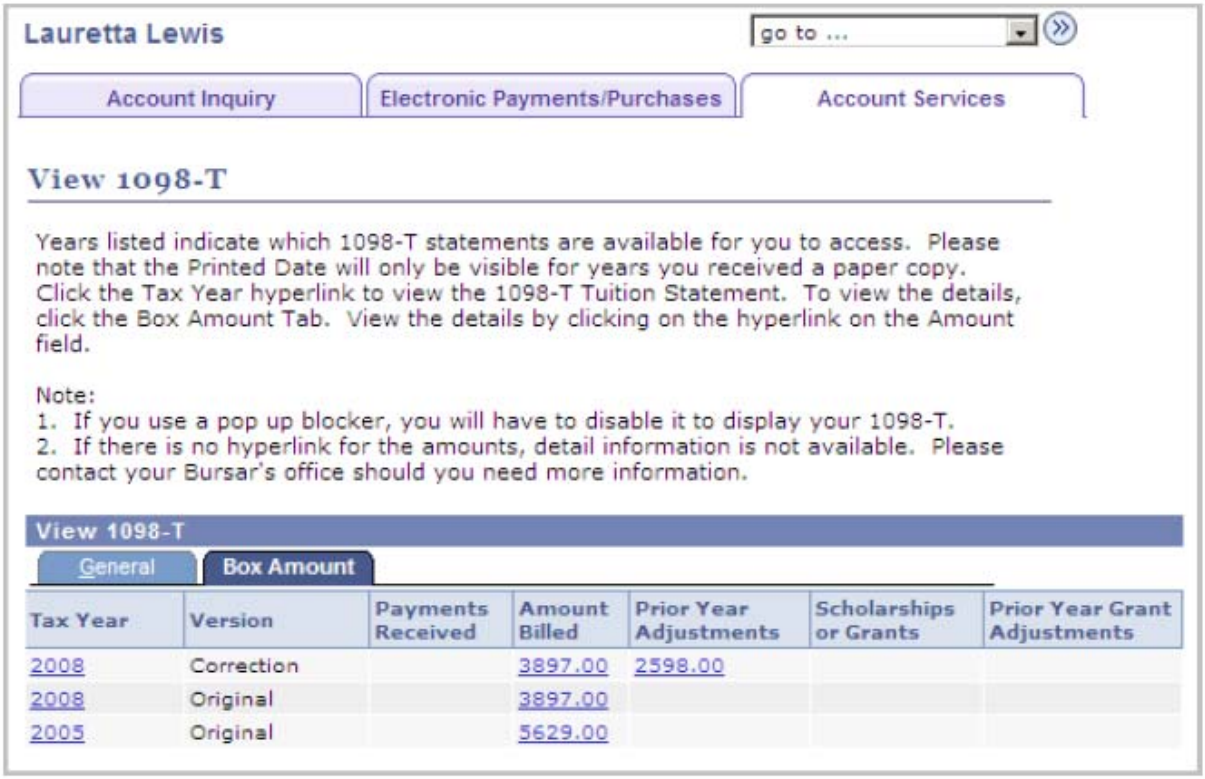
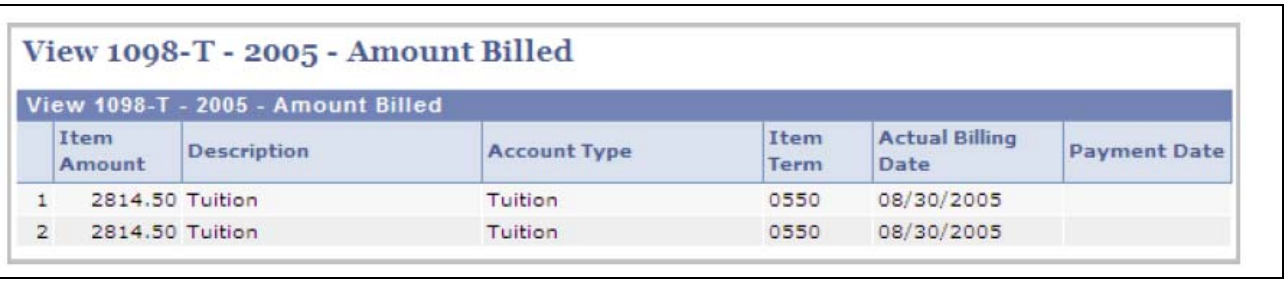


View 1098-T page, Box Amount tab

View the total amounts displayed on the 1098-T statement.

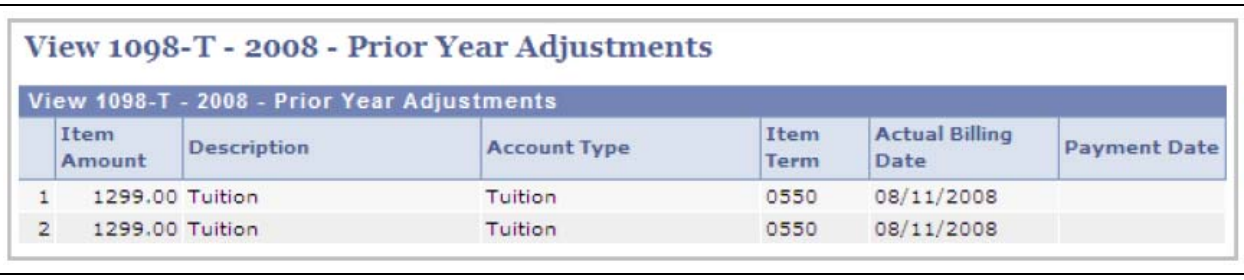
Access the View 1098- T - Amount Billed page.



View 1098-T- Amount Billed page

View the details of the eligible items billed for the calendar year. This includes the term for which the charged occurred.

Access the View 1098-T - Prior Year Adjustments page.



View 1098-T - Prior Year Adjustments page

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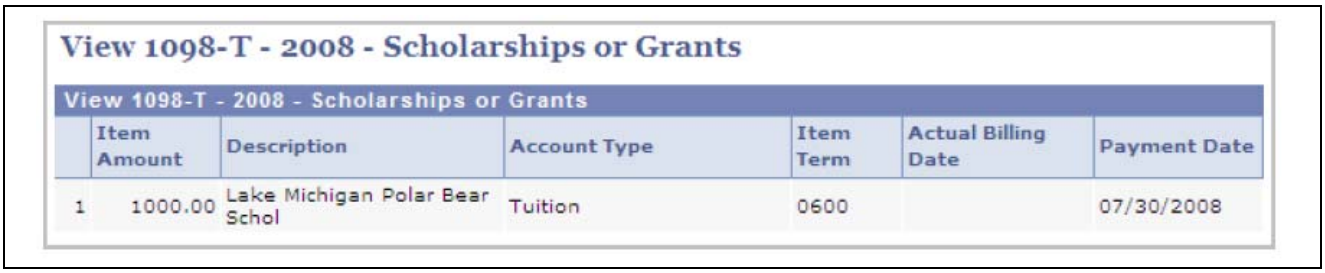
View prior year adjustments to the amount billed for an aid year.

Access the View 1098-T - Scholarships or Grants page.



View 1098-T - 2008 - Scholarships or Grants

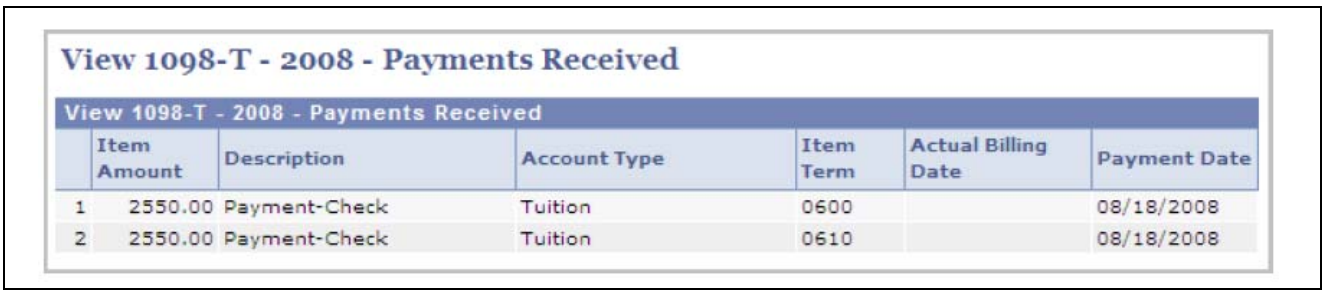
View 1098-T - 2008 - Scholarships or Grants

	Item Amount	Description	Account Type	Item Term	Actual Billing Date	Payment Date
1	1000.00	Lake Michigan Polar Bear Schol	Tuition	0600		07/30/2008

View 1098-T - Scholarships or Grants page

View a detailed summary of the scholarship or grant for an aid year. This includes the type of account, offered amount and payment date.

Access the View 1098-T-Payments Received page.



View 1098-T - 2008 - Payments Received

View 1098-T - 2008 - Payments Received

	Item Amount	Description	Account Type	Item Term	Actual Billing Date	Payment Date
1	2550.00	Payment-Check	Tuition	0600		08/18/2008
2	2550.00	Payment-Check	Tuition	0610		08/18/2008

View 1098-T - Payments Received page

View the payment received for an item. This includes the type of account and payment date.

Receiving the 1098-T Form Online

Your institution can provide the 1098-T form to students electronically. Students can consent to accessing an electronic version of the 1098-T form through student self service.

The student only sees the Consent Agreement for the 1098-T if they have *not* consented. After consent to receive the 1098-T electronically is granted, the agreement is no longer needed.

After consent is granted, it is effective for all years for which a 1098-T form was processed.

A student cannot revoke their consent online. Instead, the student must contact the institution to request that consent be revoked. Consent is revoked from an administrator page.

Completing the 1098-T Consent Agreement

Access the 1098-T Consent Agreement page (Self Service, Campus Finances, Account Services - View 1098-T, 1098-T Consent Agreement and click the Submit button).

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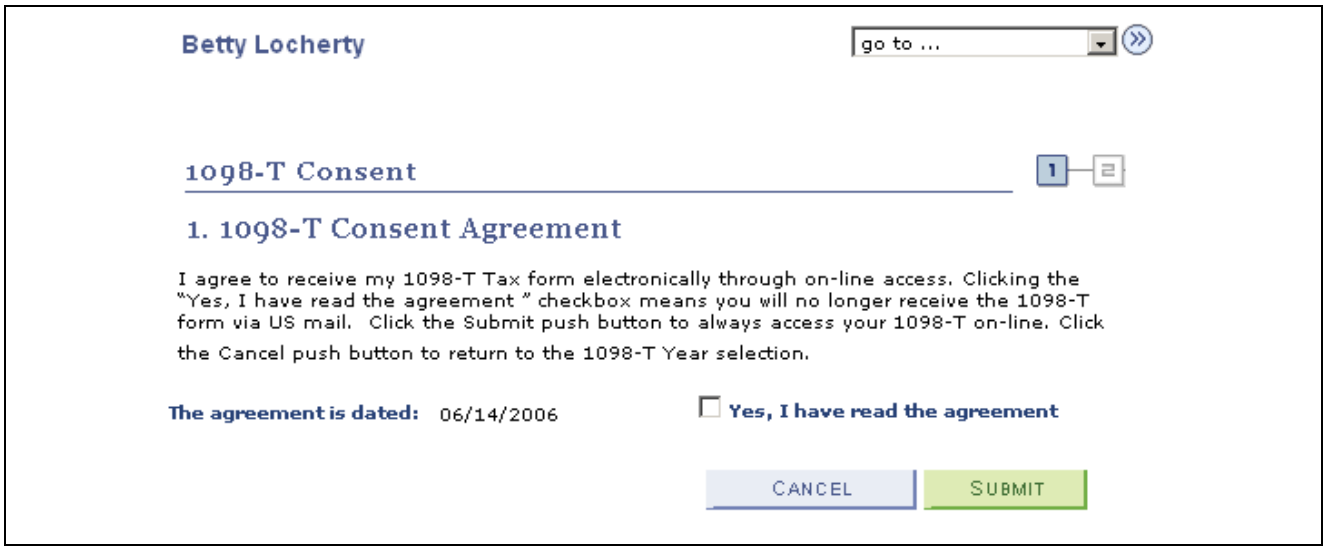
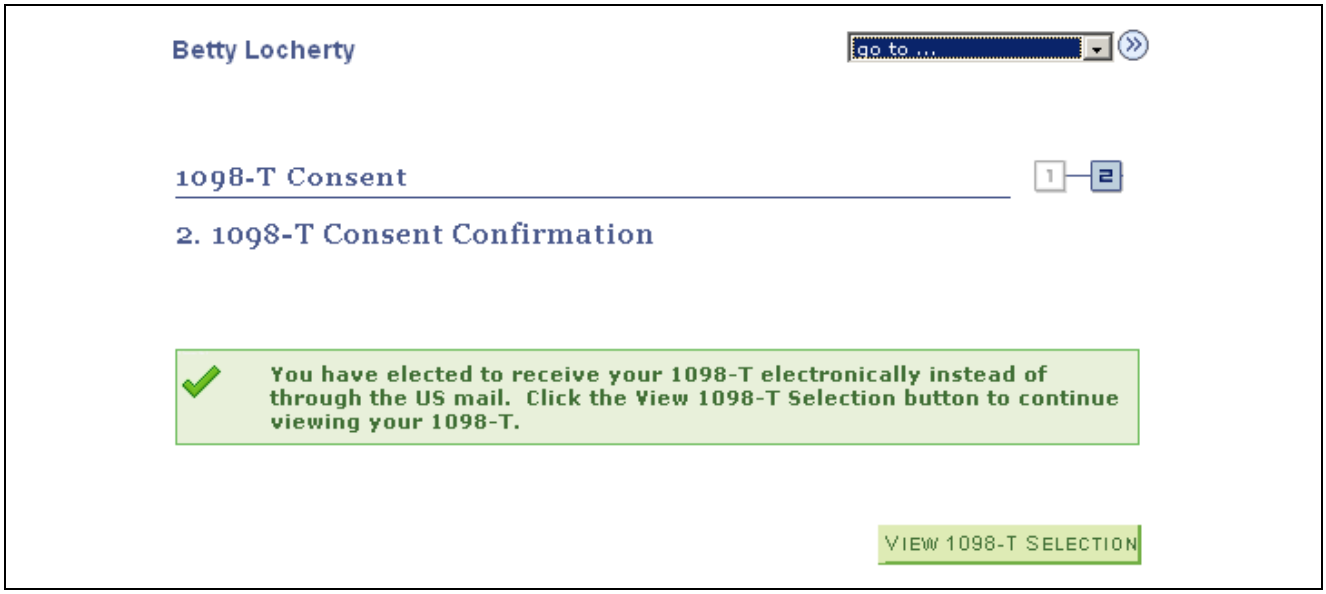


1098-T Consent Agreement page

Yes, I have read the agreement	Select to agree to receive 1098-T statements online.
Cancel	Click to cancel submission of the 1098-T Consent Agreement.
Submit	Click to submit the accepted 1098-T Consent Agreement.

Receiving the 1098-T Consent Confirmation

Access the 1098-T Consent Confirmation page.



1098-T Consent Confirmation page

This page confirms the 1098-T Consent Agreement.

View 1098-T Selection	Click to select and view a 1098-T.

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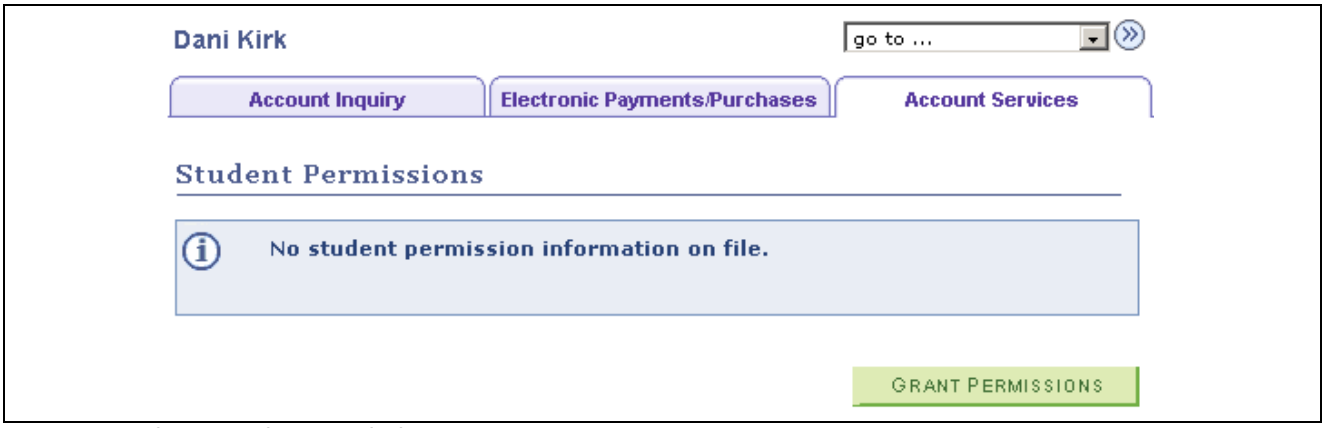
Administrators can use the *Review Self Service Agreement* page to view Enrollment agreement data.

Viewing Student Permissions

U.S. Department of Education regulations require that Title IV financial aid awards be used to pay only allowable charges, for example, tuition, mandatory fees, and contracted housing and board, for the period of enrollment covered by the aid year in which those funds are awarded. Regulations require schools to collect individual authorization from a student in order to pay non-allowable charges such as parking fees or library fines, or for the prior year immediately preceding the current year.

Access the Account Services - Student Permissions page (Self Service, Campus Finances, View Student Permissions, Account Services - Student Permissions).



Account Services - Student Permissions page

This page enables the student to begin the grant permission self-service process.

Grant Permissions Click to grant permissions.

Selecting the Permission Form

Access the Select Permission Form page (Self Service, Campus Finances, View Student Permissions, Account Services - Student Permissions and click the Grant Permissions button).

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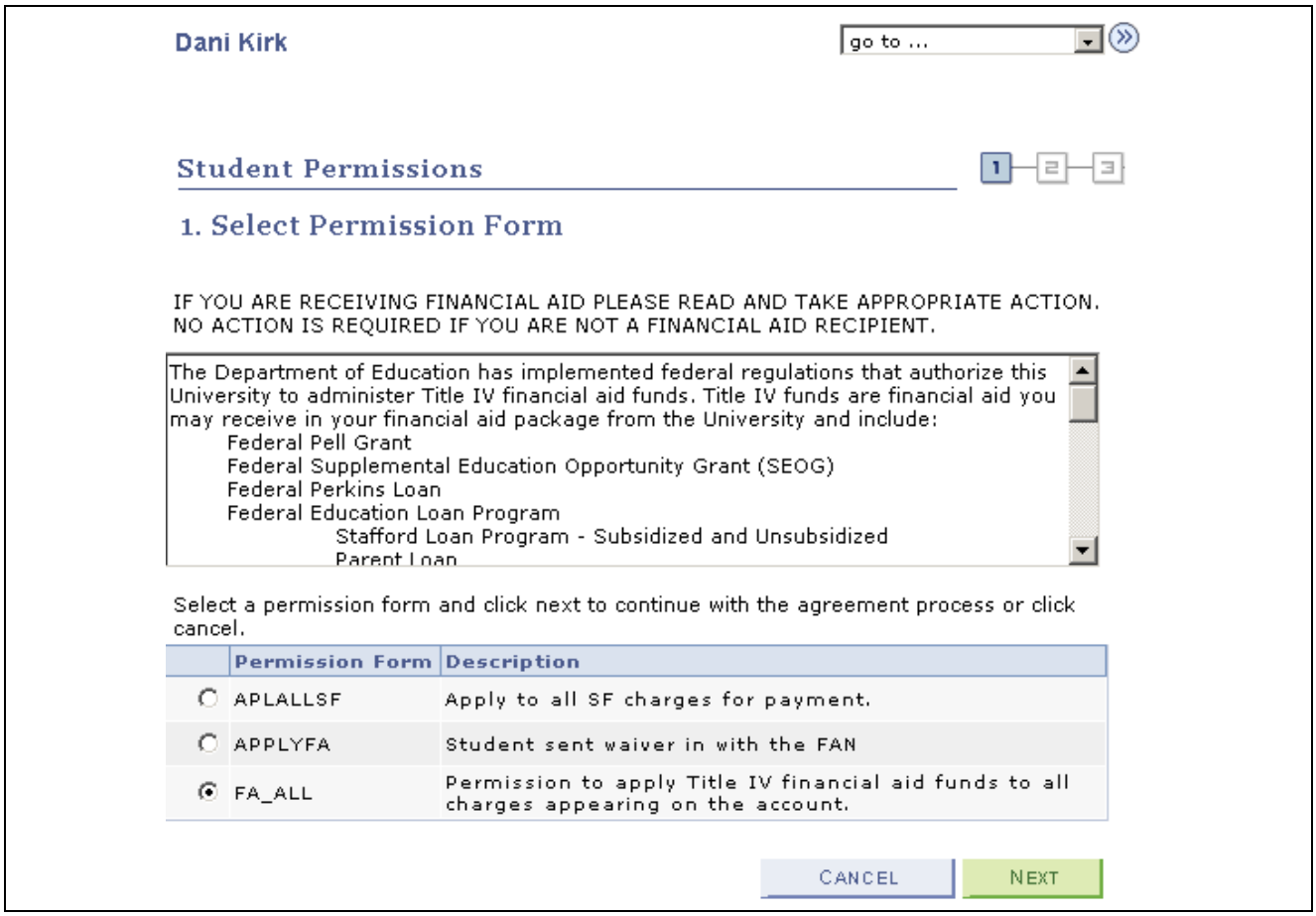

Select Permission Form page

This page enables the student to read the Disclosure Statement. If multiple permissions exist, the student can select only one and then select Next to complete the process. Then the student can select another permission for review and submission.

Granting Permission Using the Form Agreement

Access the Permission Form Agreement page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Select Permission Form and click the Next button).

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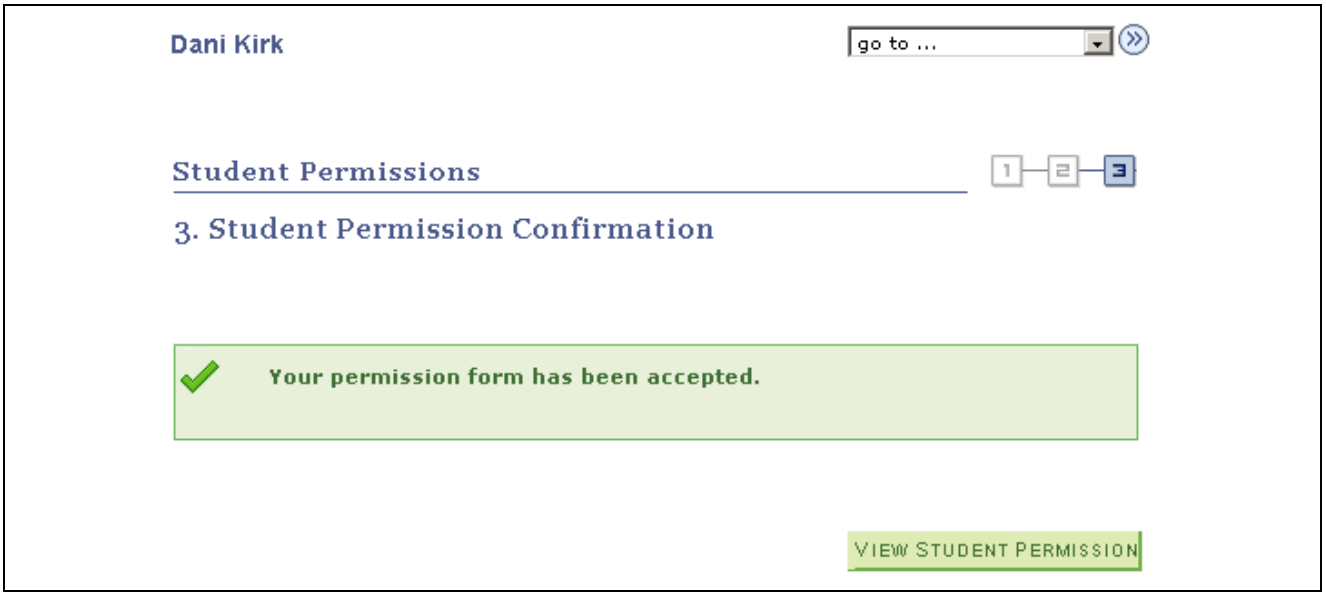
Permission Form Agreement page

This page enables the student to select the Yes, I have read the agreement check box to verify reading of the agreement and permission.

The student clicks Submit to submit the permission form agreement.

Confirming Student Permission

Access the Student Permission Confirmation page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Permission Form Agreement and click the Submit button).



Student Permission Confirmation page

Click View Student Permission to return to the authorization page.

The student cannot revoke permission using self service; this can be done only by the administrator.

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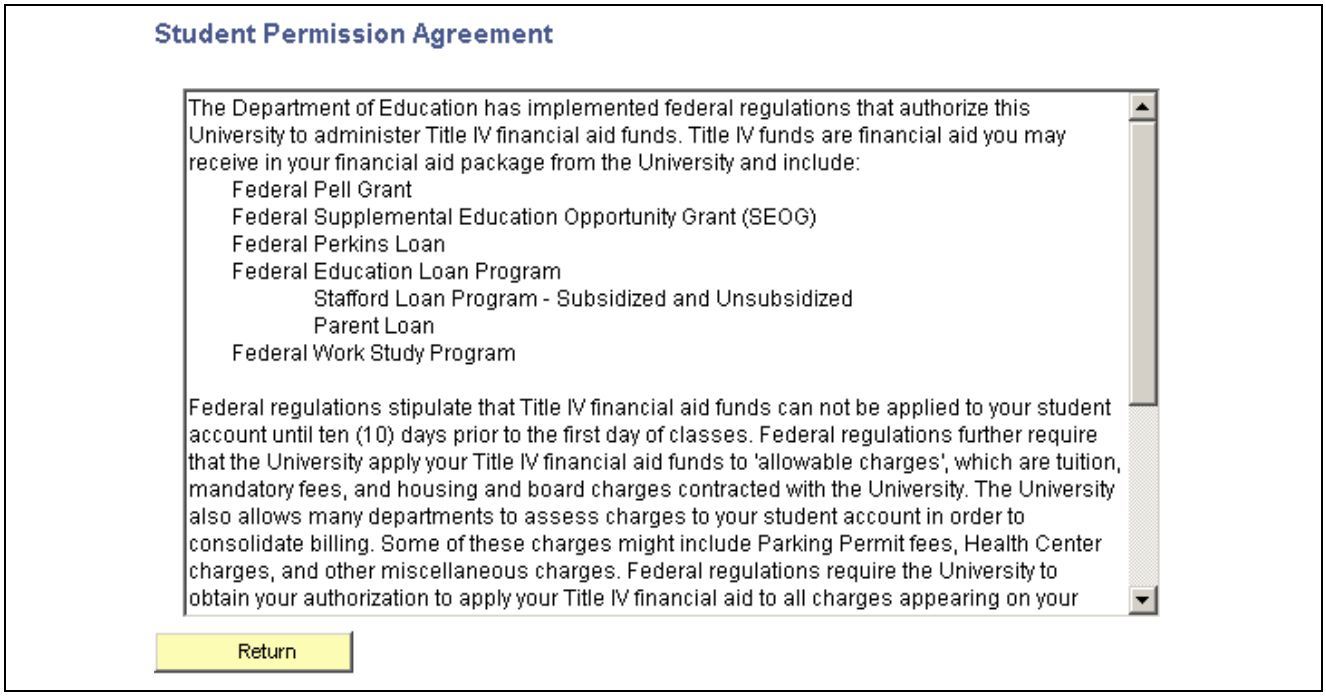
Viewing Student Permission Agreement

Access the Student Permission Agreement page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Student Permission Confirmation and click the Display Student Agreement link).



Student Permission Agreement page

The student can read the student permission agreement.

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