CHAPTER 1

(AUS) Setting Up and Using Australian Loan Processing

This chapter provides an overview of loan processing for Australian higher education and discusses how to:

- Set up Australian loan defaults.
- Review Higher Education Contribution Scheme (HECS) results and run the HECS reconciliation.
- Create and update FEE-HELP loans.
- Create and update OS-HELP loans.
- Create and update SA-HELP loans.
- Create Commonwealth Assistance Notices (CAN).

Understanding Loan Processing for Australian Higher Education

The Higher Education Loan Program (HELP) is a suite of income contingent loans: HECS-HELP, FEE-HELP, OS-HELP, and SA-HELP.

This section discusses:

- HECS-HELP
- Tuition Calculation for HECS
- FEE-HELP
- OS-HELP
- SA-HELP
- How to prepare for setting up HELP

HECS-HELP

The Higher Education Contribution Scheme (HECS) provides students with a loan to cover all or part of the Student Contribution amount. Students may also receive a discount if they choose to pay their Student Contribution up-front. HECS-HELP loans are available to eligible students enrolled in Commonwealth-supported places. If a student receives a HECS-HELP loan, the Australian government pays the loan amount directly to the higher education provider on the student's behalf, and a HECS-HELP debt is recorded with the Tax Office. No loan fees are charged on HECS-HELP loans.

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HECS requires most students to contribute to the cost of their higher education. Student Contribution is calculated for each class based on the academic student load—the EFTSL (Equivalent Full Time Student Load) and annual course contributions—HECS Bands. Student Contribution is calculated based on a student's load as of the census date for the term. A student's total Student Contribution for the term is based on the sum of the Student Contribution amounts for each class in which the student is enrolled for that term.

Students can pay their Student Contribution in full, make a partial payment and defer the remainder, or defer the entire amount. Students who defer the payment of their Student Contribution incur a debt with the government that is repaid through the taxation system when the student's salary is above a predetermined level.

Administering HECS requires you to complete tasks using the PeopleSoft system as well as tasks outside the system. The tasks that use the system during HECS processing are listed here. They are organized into groups based on the time frame for performing the tasks during the academic cycle.

At the time of enrollment:

- Estimate each student's Student Contribution by term for the classes in which the student is enrolling.

  The Student Contribution is a type of tuition fee and that you calculate using the Tuition Calculation process.
- Inform all students in writing of their Student Contribution by sending student bills.

By the census date of each term:

- Collect and enter into the system full up-front payments from students who choose the up-front payment option for HECS payments.
- Collect and enter into the system partial up-front payments from students who choose the deferred payment option for HECS payments.

After the census date of each term:

- Calculate the actual Student Contribution of each student as of the census date.
- Inform all students in writing of their Commonwealth Support.

  A CAN must be issued within 28 days of the class census date.
- Refund any excess contributions, confirm payment application for Student Contributions, or both.

Note. Every time tuition is calculated or a payment is processed for a student, the system updates the student's HECS calculations.

- Supply the Australian Tax Office (ATO) with a file of data containing details of the HECS liabilities of students who elect to defer payment of their contributions together with relevant personal identification details required by the ATO.

  Do this through DIISRTE (Department of Industry, Innovation, Science, Research and Tertiary Education) reporting.
- Supply DIISRTE with a file of data on HECS liabilities for all students.

  Do this through DIISRTE reporting.
- Supply DIISRTE with information regarding adjustments to up-front payments and refunds due to special circumstances.
- Supply the ATO with information about changes to HECS liabilities that were made after the initial data files were sent.

  Do this through DIISRTE reporting.

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See [PeopleSoft Student Records 9.0 PeopleBook](AUS) Setting Up Government Reporting.

Students must complete a Commonwealth Assistance Form (CAF) for each program in which they are enrolled before the census date of the first term in which they commenced their program of study. Students who want to defer all or part of their Student Contribution must provide a valid Tax File Number (TFN) on the Payment Options Declaration form. Students cannot be enrolled if they have not completed these requirements.

Calculating Student Contribution and Deferment Amounts

The Higher Education Support Act 2003 (HESA) requires higher education providers to allocate individual units of study (courses) to funding clusters. Units of study are allocated to funding clusters based on their classification against the Australian Standard Classification of Education (ASCED). Each provider then determines the Student Contribution amount applicable to each unit of study up to a maximum Student Contribution amount allowed for the funding cluster in which the unit is classified. The funding clusters are currently grouped into four contribution bands.

Commonwealth-supported students are classified into three groups for the purpose of determining the maximum Student Contribution amount:

- Post-Reform students (student commenced course of study on or after 1 January 2005).
- Pre-2005 Differential HECS students.
- Pre-1997 students or *Fixed HECS.*

If students make up-front payments, they may be eligible for a discount on their Student Contribution amount.

If a student withdraws from a program of study on or before the census date, no Student Learning Entitlement is consumed and no contribution is payable. The institution must refund any payments made by the student for that term.

Making Payments

Students can pay their Student Contribution in these ways:

- Pay the Student Contribution in full up-front and receive a 20 percent discount on the total Student Contribution for the term.
- Make a partial up-front payment of 500.00 AUD or more and receive a 20 percent discount on that payment; the remainder of the Student Contribution is deferred. (Note that if a student's assessed fees are less than 500.00 AUD, then he or she can make a partial payment and still receive the 20 percent discount.)
- Make a payment of less than 500.00 AUD with no discount applied; the remainder of the Student Contribution is deferred.
- Defer payment and repay through the ATO when the student's income exceeds the minimum repayment threshold.

Students who complete the CAF are required to indicate their intended payment option on the form. This information is intended to provide institutions with an indication of students' intended payment options. A student's actual payment option is determined after the census date based on the up-front payments that the student made on or before the census date. This determines the student status that is applicable at the enrollment level.

Note. After the census date, students can make only repayments of deferred Student Contribution to a branch of the ATO.

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Making Full Up-Front Payments

Students who want to make a full up-front payment must pay 80 percent of their Student Contribution for the term by the census date or the date set by the institution, whichever is earlier. When students pay 80 percent of their total Student Contribution, the remaining 20 percent of their Student Contribution is discounted. If a student has not made a full up-front payment of the Student Contribution for the term by the census date and has not provided a TFN, the institution must cancel the student's enrollment.

A payment of more than 80 percent of the total Student Contribution for a term cannot be used to reduce the student's HECS debt from previous terms. Any overpayment amount should be left on the student's account as an unapplied charge or can be refunded to the student.

Making Partial Up-Front Payments

Students can choose to make partial up-front payments toward their Student Contribution. If a student makes an up-front payment of 500.00 AUD or more, the student can receive a discount on that payment. Partial up-front payments can be made to the institution only before the census date.

Institutions can accept partial payments that total less than 500.00 AUD; however, payments that total less than 500.00 AUD are not discounted (unless the total Student Contribution amount applicable to the student, program, and census date is less than 500.00 AUD).

Deferring All Charges

Eligible students can choose to make no up-front payments and defer the entire Student Contribution amount. If they choose this option, they must provide a TFN to their institution on the CAF. No discount exists for students who defer their entire Student Contribution amount.

Tuition Calculation for HECS

The Tuition Calculation process calculates tuition using HECS bands. When you set up Term Fee codes for HECS charges, you indicate that the fee should be charged by band. When Tuition Calculation processes a fee charged by band, the process knows that it must calculate the HECS load factor, which is the EFTSL using billing units. The HECS load factor calculation uses the Level/Load rules from the student's academic program. The process calculates the HECS load factor for each class. It then calculates the charges for each class in which the student is enrolled by using the band assigned to the class and the band charge that is indicated on the Fee Code table (SEV_FEE_TBL). Fee codes are assigned to tuition groups and students are selected for tuition groups based on the selection criteria that is set up for the tuition group.

To calculate a HECS discount waiver or HECS deferral waiver, the Tuition Calculation process references the student liability status code, which is indicated on the AUS Student Enrol page in the Enrollment component. The appropriate discount or deferral waiver is created based on the enrolment level student status.

When a student makes a payment for HECS, the posting program updates the enrolment-level student liability status, if necessary, based on the amount of the payment. For example, if a student indicates that he or she will make a partial payment, but the student actually makes a full payment, the Payment Posting process changes the enrolment level student status code accordingly.

Note. The student liability status referenced on the HECS Election page in the Term Activation component is a default value for all enrolments in that program and term. Tuition calculation, payment processing, or HECS reconciliation processing never updates the default value.

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FEE-HELP

FEE-HELP is a loan program that provides eligible fee-paying students with help to pay part or all of their tuition fees. The Commonwealth pays the amount of the loan directly to the student's provider. Students repay their loan through the tax system after their income is above the minimum threshold for compulsory repayment. A 20 percent loan fee is applied if a student in an undergraduate course of study accesses FEE-HELP.

OS-HELP

Overseas HELP (OS-HELP) assists eligible undergraduate Commonwealth-supported students to undertake some of their courses of study overseas. OS-HELP is not available to students undertaking all of their courses outside Australia. The loans are allocated to higher education providers (HEPs). The HEPs select the students who receive the loans. Eligible students can borrow up to 5,000.00 AUD per study period for one or two study periods of overseas study.

See lssf, (AUS) Setting Up and Using Australian Loan Processing, Setting Up Australian Loan Defaults, Defining OS HELP Loan Defaults.

SA-HELP

As of academic year 2012, government legislation allows higher education institutions to charge students a fee for amenities. The fee has a capped annual amount, half of which is usually charged at the start of each semester. The Due Date is the date in the semester on which the government and institution consider that a student owes the fee—this date usually coincides with the census date. Part time students with less than 75 percent of a standard full time load are charged a smaller fee amount than full time students.

Student Amenities HELP (SA-HELP) allows students to defer payment of their Student Amenities fee.

See [PeopleSoft Student Financials 9.0 PeopleBook]Defining SA-HELP Loan Defaults.

See [PeopleSoft Student Financials 9.0 PeopleBook]Creating and Updating SA-HELP Loans.

Preparing for Setting Up HELP

These are some of the general setup steps that you must complete within Student Financials:

- Set up Australian loan data.
- Set up HECS-HELP account types.
- Set up HECS and FEE-HELP item types.
- Set up HECS and FEE-HELP charge priority lists.
- Set up a HECS and a FEE-HELP tuition group.

  You specify the HECS Fee code in a HECS tuition group.
- Set up HECS and FEE-HELP criteria.
- Set up SA Fee accounts types (with account per term).
- Set up SA Fee and SA-HELP item types and item type groups.
- Set up tree manager with SA Fee item types.
- Set up SA Fee session based term fees.
- Add SA Fee term fee to tuition groups.
- Set up charge priority list.

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- Set up payment overall priority by charge tree node.

These are some of the general setup steps that you must complete outside of Student Financials:

- Set up foundation table reporting codes.
- Set up academic structure defaults.
- Set up DIISRTE reporting codes.
- Set up items in the course catalog.
- Activate and enroll students.

See Also

lsfn, (AUS) Setting Up Government Reporting

lssr, (AUS) Setting Up Government Reporting

lssr, (AUS) Generating Government Reports

Setting Up Australian Loan Defaults

This section discusses how to:

- Define liability statuses.
- Define HECS HELP loan defaults.
- Define FEE HELP loan defaults.
- Define OS HELP loan defaults.
- Define SA HELP loan defaults.
- Define status change rule loan defaults.
- Set up HECS fee codes.
- Set up HECS band fees.
- Link band fees to tuition groups.
- Exclude HECS classes.

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Pages Used to Set Up Australian Loan Defaults

Page Name	Definition Name	Navigation	Usage
Liability Status	SSF_HECS_EX_TBL	Set Up SACR, Product Related, Student Financials, Australian Defaults, Liability Status	Define liability statuses.
HECS HELP	SSF_ANZ_LOAN_DEF	Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, HECS HELP	Define HECS HELP loan defaults.
FEE HELP	SSF_PELS_DEF_ANZ	Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, FEE HELP	Define FEE HELP loan defaults.
OS HELP	SSF_OSHELP_DEF_ANZ	Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, OS HELP	Define the OS HELP loan defaults.
SA-HELP	SSF_SAHELP_DEF	Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, SA-HELP	Define the SA HELP loan defaults.
Status Change Rule	SSF_STAT_CHNG_RULE	Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, Status Change Rule	Define status change rule loan defaults.
HECS Fee Codes	SFF_HECS_CD_TABLE	Set Up SACR, Product Related, Student Financials, Australian Defaults, HECS Band Fees, HECS Fee Codes	Set up HECS fee codes.
HECS Band Fees	SSF_HECS_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Australian Defaults, HECS Band Fees	Define the band fees for HECS eligible students. These band fees can be cohort specific.
Tuition Groups - Definition	SEL_GROUP_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Groups, Definition	Link HECS band fees to tuition groups.
Term Fees	TERM_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Term Fees	Exclude HECS classes from a term fee.

Defining Liability Statuses

Access the Liability Status page (Set Up SACR, Product Related, Student Financials, Australian Defaults, Liability Status).

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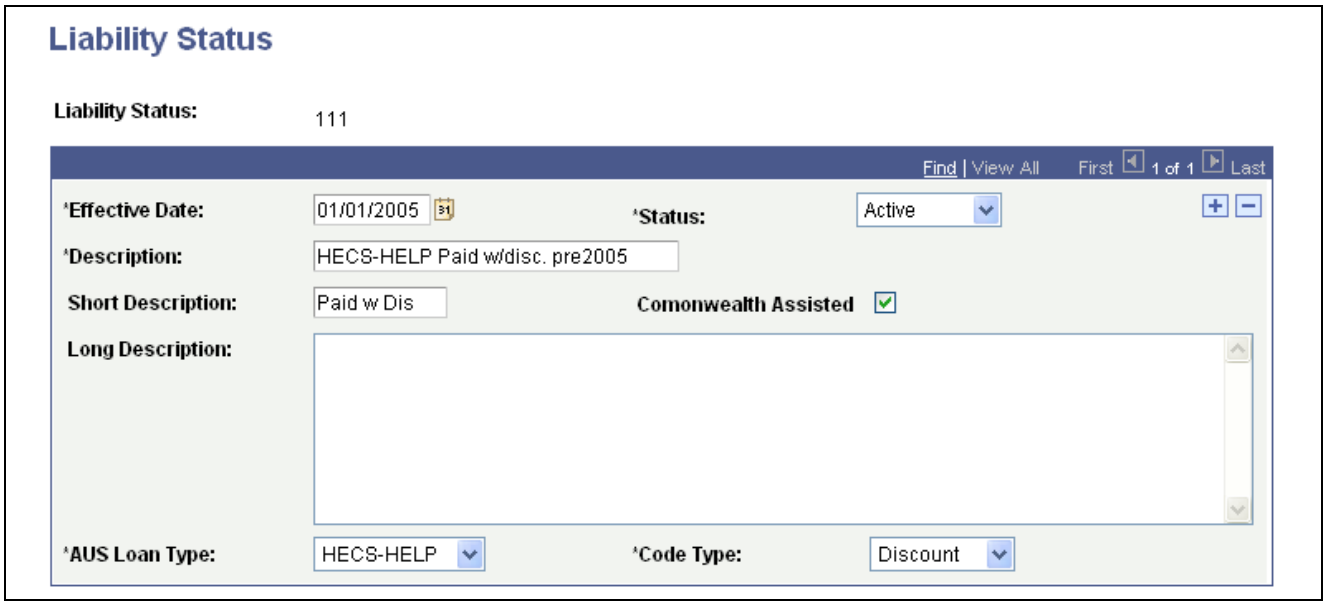

Liability Status page

The discount and deferral payment processes use these codes. Each liability status can be assigned only one code type. The code types are *Deferral*, *Discount*, and *Normal*.

Commonwealth Assisted

Select to indicate whether the liability status is valid for reporting students in the Commonwealth Assisted Students file and the Revised Commonwealth Assisted Students file.

Ensure that the selection is correct for the file scope.

AUS Loan Type

Select the loan type. Values are:

FEE-HELP: Specify a FEE-HELP liability status.

HECS-HELP: Specify a HECS-HELP liability status.

OS-HELP: Specify an OS-HELP liability status.

SA-HELP: Specify a SA-HELP liability status.

Exempt: Specify an Exempt liability status. The charge for the class will not appear on the CAN, and will have an (E) for Exempt next to 0.00 AUD charge in the charge column.

Code Type

Defines the Exemption code.

Values are:

Deferral for the Exemption Status code that is used to defer liability.

Discount for the Exemption Status code that is used to discount liability.

Normal for all other Exemption Status codes.

Defining HECS HELP Loan Defaults

Access the HECS HELP page (Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, HECS-HELP).

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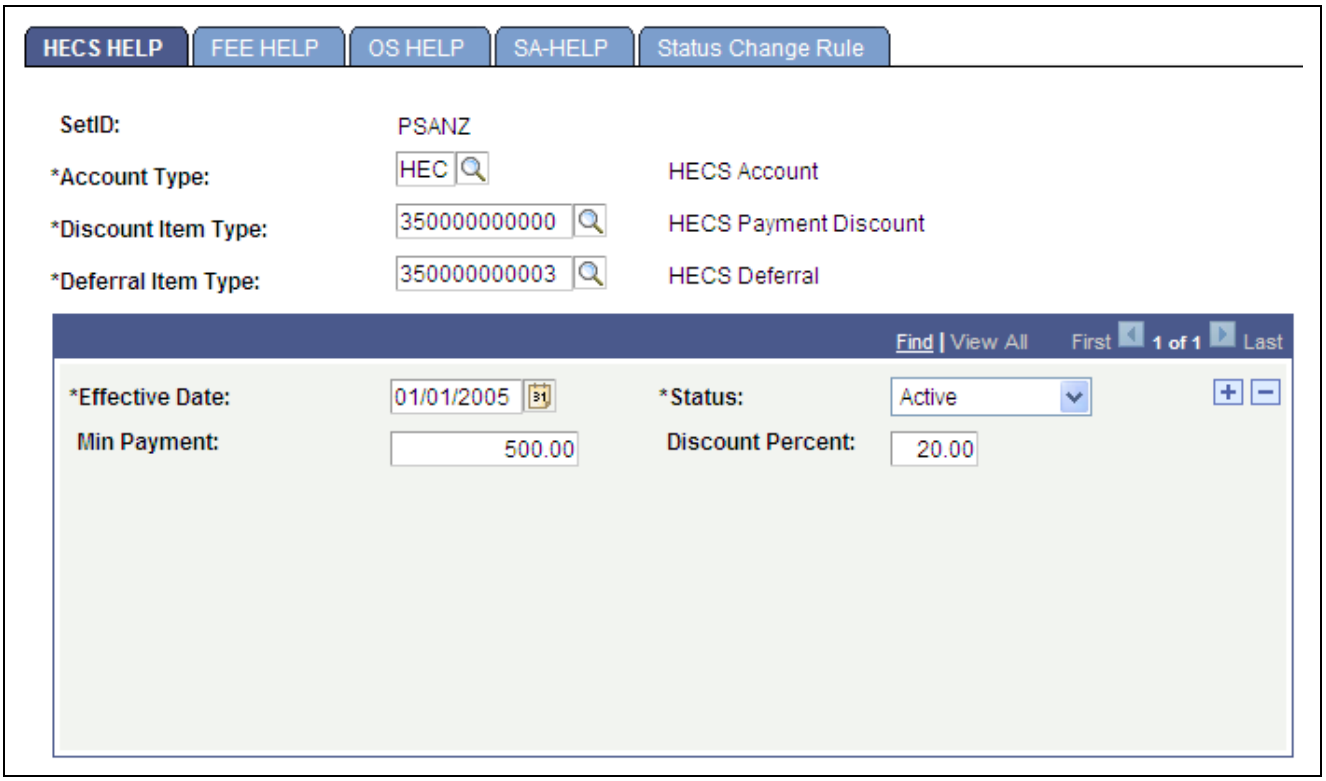

HECS HELP page

Use this page to define the minimum payment amount and the discount percent for your HECS SetID, account type, and item types.

Defining FEE HELP Loan Defaults

Access the FEE HELP page (Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, FEE HELP).

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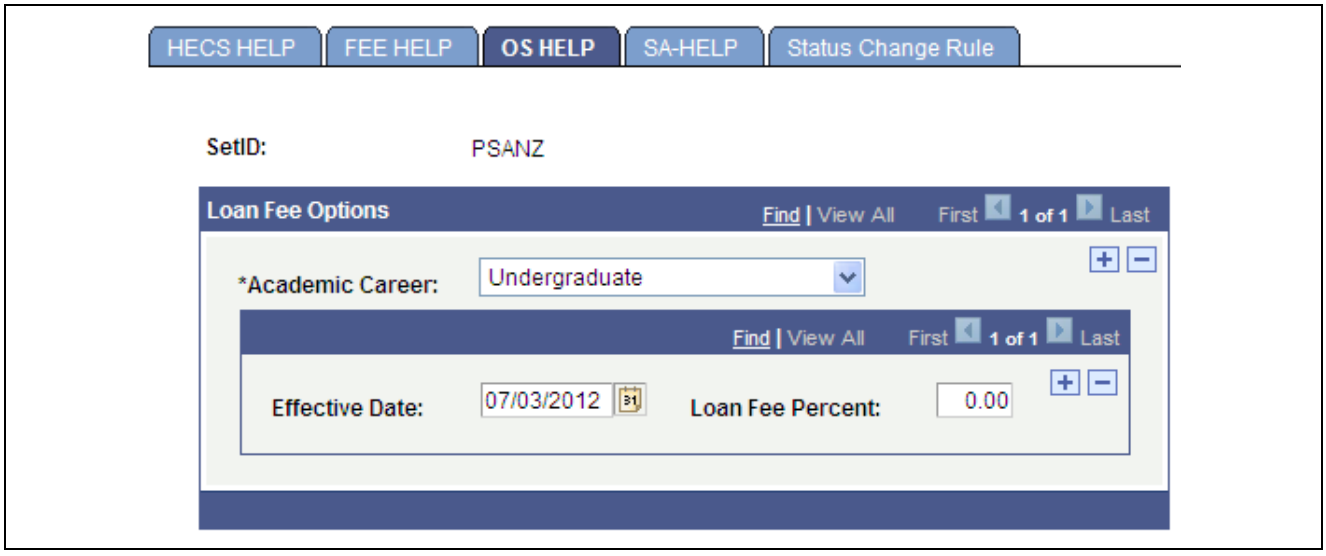
FEE HELP page

Use this page to define, for each career, the FEE-HELP loan fee percent amount.

Defining OS HELP Loan Defaults

Access the OS HELP page (Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, OS HELP).



OS HELP page

Use this page to define the OS-HELP loan fee percent amount. OS-HELP does not appear in a student's account; however, the loan fee percent and the loan amount appear in CAN or DIISRTE reports.

Use the Academic Career field to designate which careers are eligible to receive an OS-HELP loan.

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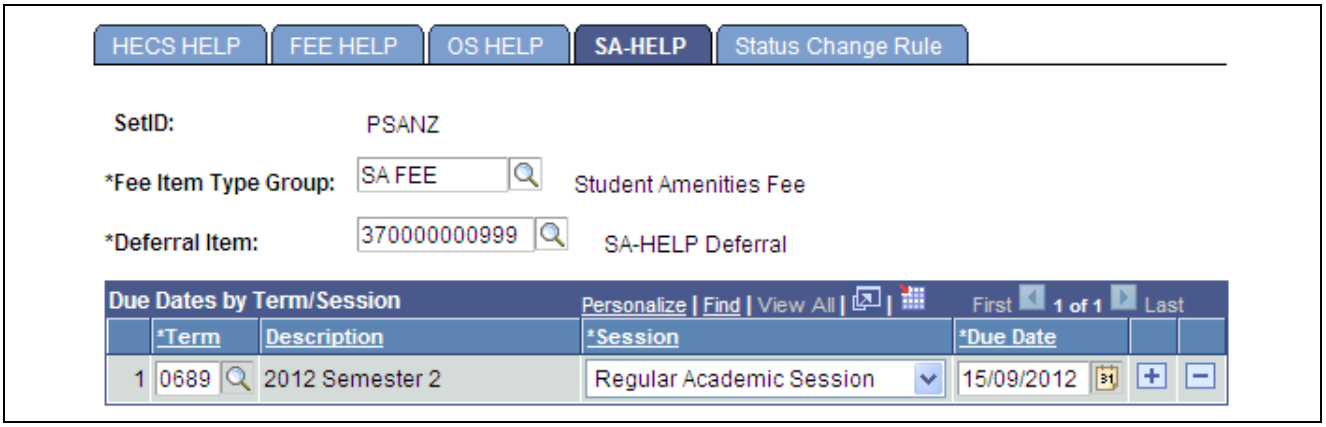
See Also

lssf, (AUS) Setting Up and Using Australian Loan Processing, Creating Commonwealth Assistance Notices

lssr, (AUS) Setting Up Government Reporting

Defining SA-HELP Loan Defaults

Access the SA-HELP page (Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, SA-HELP).



SA-HELP page

Fee Item Type Group The SA-HELP Deferral process uses this value to identify the SA Fee charges.

Set up item type groups on the Item Type Groups page (Set Up SACR, Product Related, Student Financials, Item Types, Item Type Groups).

Deferral Item The SA-HELP Deferral process uses this value to identify the item type to which the SA Fee amount should be deferred.

Set up item types in the Item Types component (Set Up SACR, Product Related, Student Financials, Item Types, Item Types, Initial Setup).

Due Dates by Term/Session

To ensure that the SA-HELP Deferral process runs correctly, you must set up SA Fees as Term Fees. SA Fees must be created using Session values, so that these values can be mapped to the Due Dates. Even if only one session exists per term, you must specify that session as the one to be used by the deferral process.

See [PeopleSoft Student Financials 9.0 PeopleBook]Setting Up Fees and Tuition Groups .

Due Date The Due Date is the date on which the SA Fee is deferred if it has not been paid. This date is typically on or around the Census Date for the term. However, the Due Date may be different for each session in a term.

See Also

[PeopleSoft Student Financials 9.0 PeopleBook]Creating and Updating SA-HELP Loans

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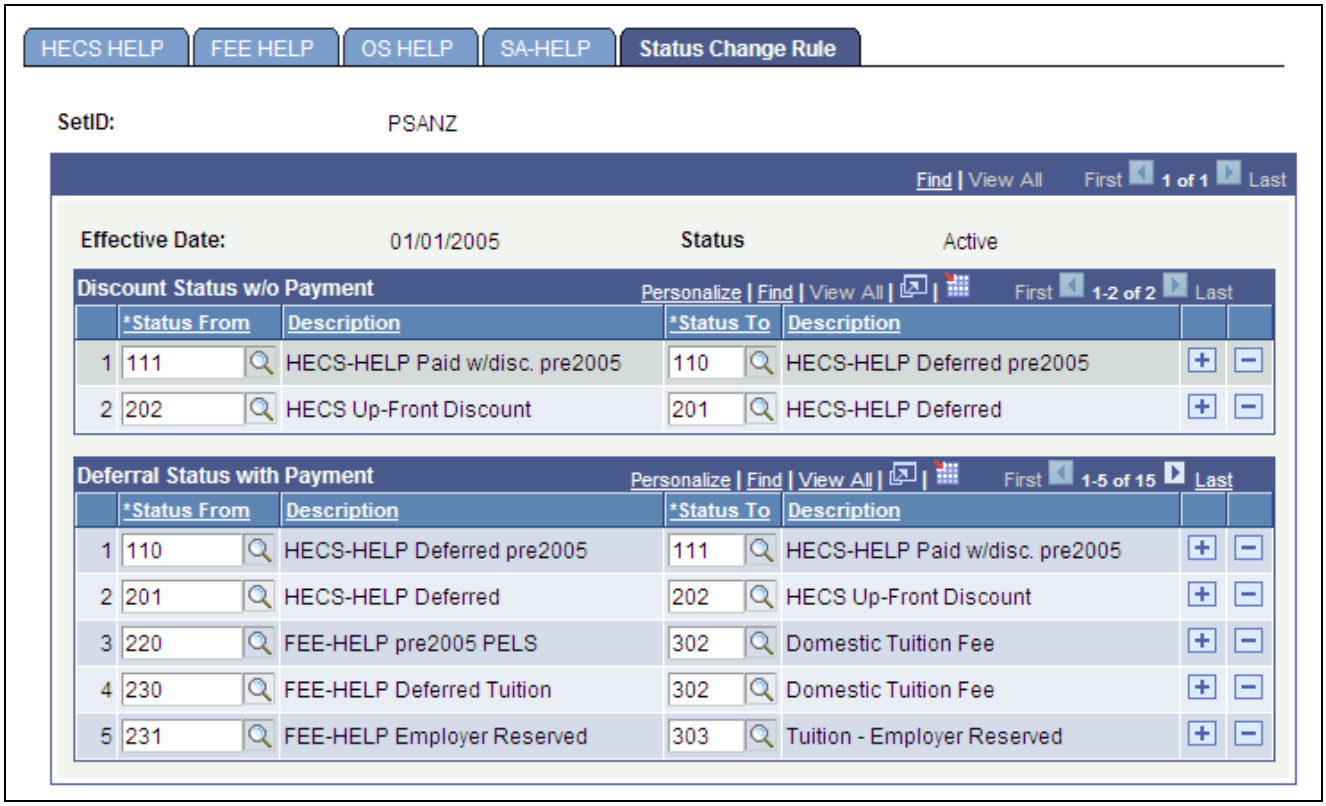
Defining Status Change Rule Loan Defaults

Access the Status Change Rule page (Set Up SACR, Product Related, Student Financials, Australian Defaults, Loan Default, Status Change Rule).



Status Change Rule page

Use this page to define the rules that you want to set for changing liability statuses. For example, a student is assigned a liability status of *111* for 2005, and pays his or her fees with a discount of 20 percent. After the tuition calculation and reconciliation is run, you discover that the fees did not meet the 500.00 AUD requirement, so the student's status changes to *110* (deferred).

Liability statuses are delivered values.

See lssf, (AUS) Setting Up and Using Australian Loan Processing, Setting Up Australian Loan Defaults, Defining Liability Statuses.

Setting Up HECS Fee Codes

Access the HECS Fee Codes page (Set Up SACR, Product Related, Student Financials, Australian Defaults, HECS Band Fees, HECS Fee Codes).

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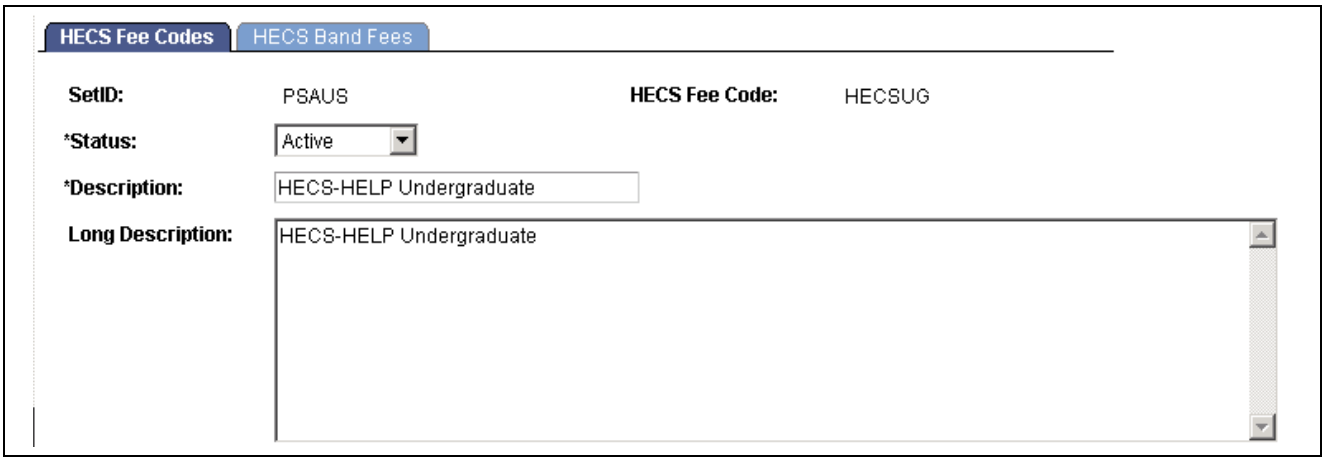


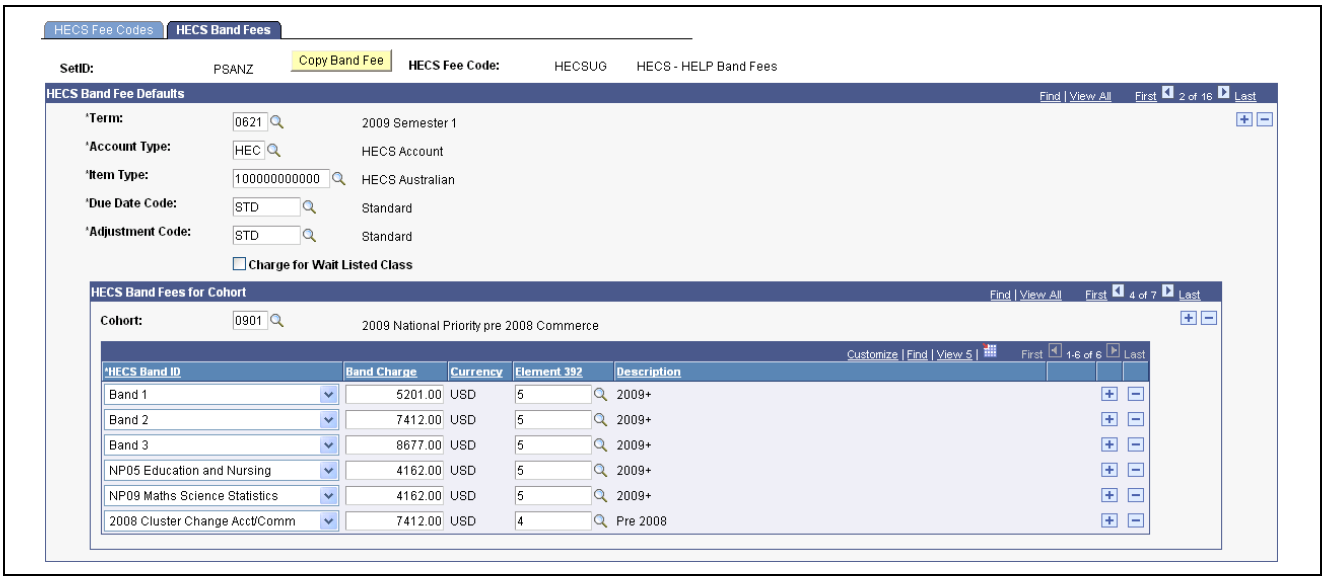
HECS Fee Codes page

HECS band fees determine the rate of the charge (Student Contribution amount) for a course taken by a Commonwealth-Supported student. The government provides the maximum Student Contribution amount allowable via funding clusters. Student Financials uses the band ID to calculate the Student Contribution amount.

Note. Configuration of Student Contribution amounts via Band Fee Codes acknowledges the original terminology for the Higher Education Contribution Scheme (HECS). Maximum Student Contribution amounts are outlined in the current legislation and guidelines grouped by Funding Cluster. The combination of Band ID assigned to the course and cohort assigned to the band fee code allow institutions the flexibility to cater for as many student contribution amounts as desired for a single course (DIISRTE Unit of Study).

Setting Up HECS Band Fees

Access the HECS Band Fees page (Set Up SACR, Product Related, Student Financials, Australian Defaults, HECS Band Fees).



HECS Band Fees page

These are the definitions of the different HECS bands:

- Band 1: Humanities, Arts, Behavioral Science, Social Studies, Foreign Languages, Visual and Performing Arts.

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- Band 2: Accounting, Commerce, Administration, Economics, Mathematics, Statistics, Computing, Built Environment, Health, Engineering, Science, Surveying, Agriculture.
- Band 3: Law, Dentistry, Medicine, Veterinary Science.
- Band 4: National Priorities: Education and Nursing.
- Fixed HECS: Enables you to set up an amount for students who started their courses before 1997.

Copy Band Fee	Click this button to copy a band fee from one term to another. If cohort values are associated with the Band Fee on the source term, these will be copied to the target term.
Term	Enter the term to which the band fee applies.
Account Type	Enter the account type that will reflect on the customer account for students subject to the band fee.
Item Type	Enter an item type applicable to the Student Contribution amount charged.
Due Date Code	Enter a due date code (calendar) to define when the fee is due and payable.
Adjustment Code	Enter the adjustment code (calendar) that governs this fee. This code determines the refund amount for students who drop classes.
Charge for Wait Listed Class	Select to charge the band fee for students who are on a waiting list for a class.
Cohort	An attribute of the Student Program for Institutions using installation settings for Australia and inherited as the default value on the student enrolment record. The cohort value on the enrolment will determine the HECS Band Fee that is applicable. The cohort value can be blank.
HECS Band ID	A unique identifier assigned on the Course Offering that will determine the student contribution amounts applicable to an enrolment in the course. Traditionally, Band ID values of 1 through 4 were maintained to acknowledge a single contribution amount published by the government that was applicable to the HECS band associated with the Discipline Group Code for the Unit for Study. The current legislative regime allows for a maximum student contribution amount applicable to the funding cluster associated with the Unit of Study subject to transitional arrangements in place at any given time for particular cohorts of students. The Band ID associated with the course still controls the student contribution amounts charged, but any number of values may be configured to accommodate the policy and legislative requirements of the institution.
Band Charge	The charge (Commonwealth contribution amount) for each band ID and cohort combination.
Element 392	Select the maximum student contribution code that is reportable as Element 392 in the DIISRTE Load/Liability file.

See Also

lssr, (AUS) Setting Up Government Reporting

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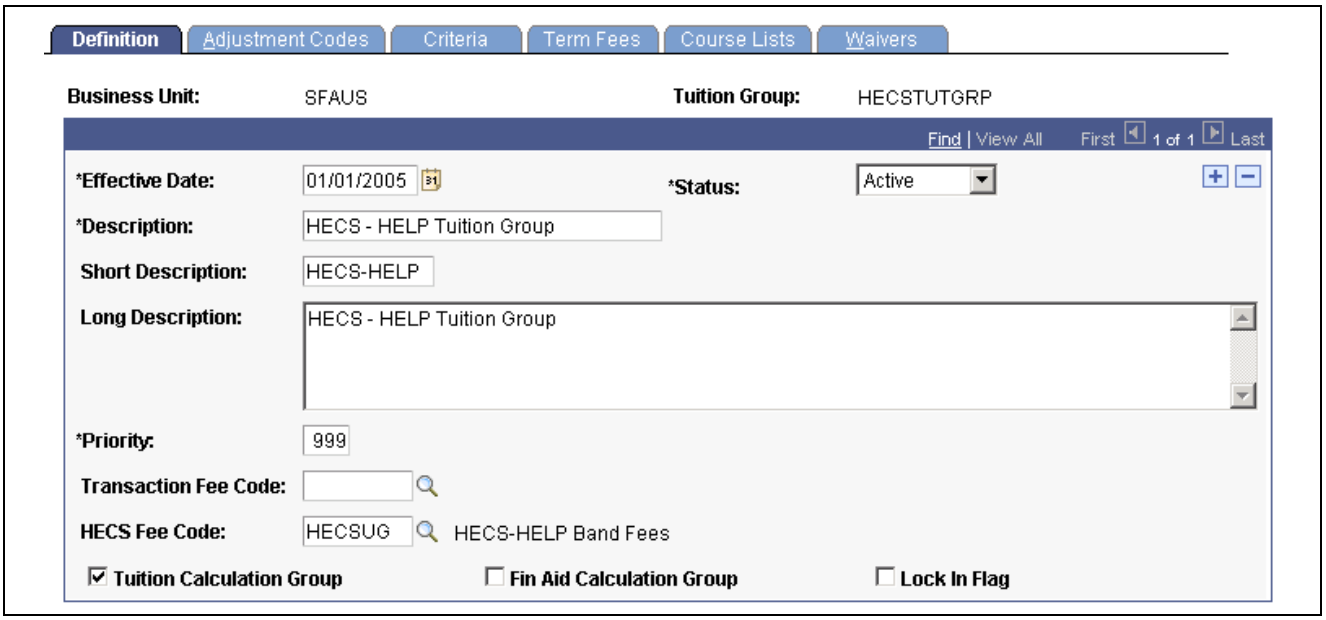
Linking Band Fees to Tuition Groups

Access the Tuition Groups - Definition page (Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Groups, Definition).



Tuition Group - Definition page

Use the Definition page to add the HECS fee code to the tuition group.

HECS Fee Code Link the HECS Band Fee code that you set up here.

Excluding HECS Classes

Access the Term Fees page (Set Up SACR, Product Related, Student Financials, Tuition and Fees, Term Fees).

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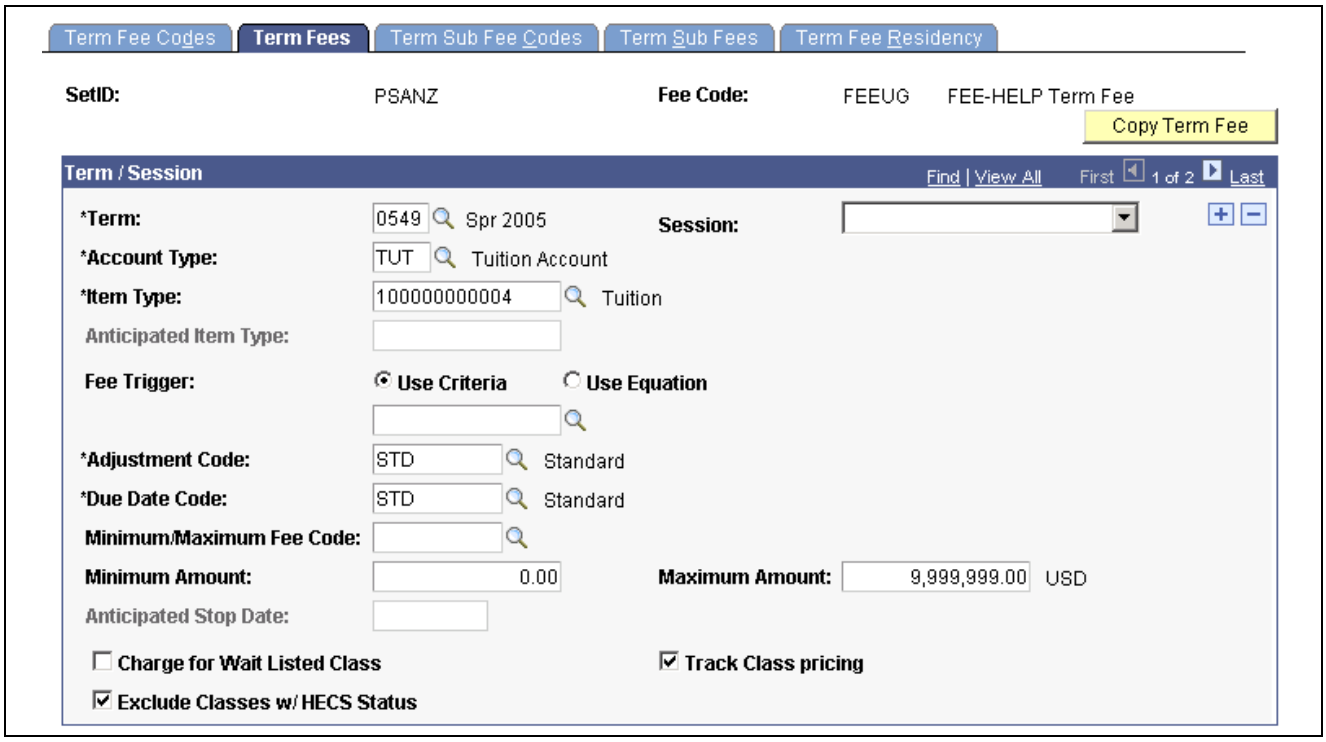

Term Fees page

You can exclude HECS classes from a term fee.

Exclude Classes w/ HECS Status exclude classes with HECS status

Use to exclude classes that are covered by HECS-HELP from the tuition calculation. Each class is assigned a liability status, so one class could be covered by HECS-HELP and another by FEE-HELP (if the student has run out of HECS-HELP eligibility). Each student can be assigned only to one tuition group so that the student is not double charged for the HECS-HELP covered course. It is excluded from the calculation.

Reviewing HECS Results and Running the HECS Reconciliation

This section discusses how to:

- Review HECS results.
- Reconcile HECS on the census date.

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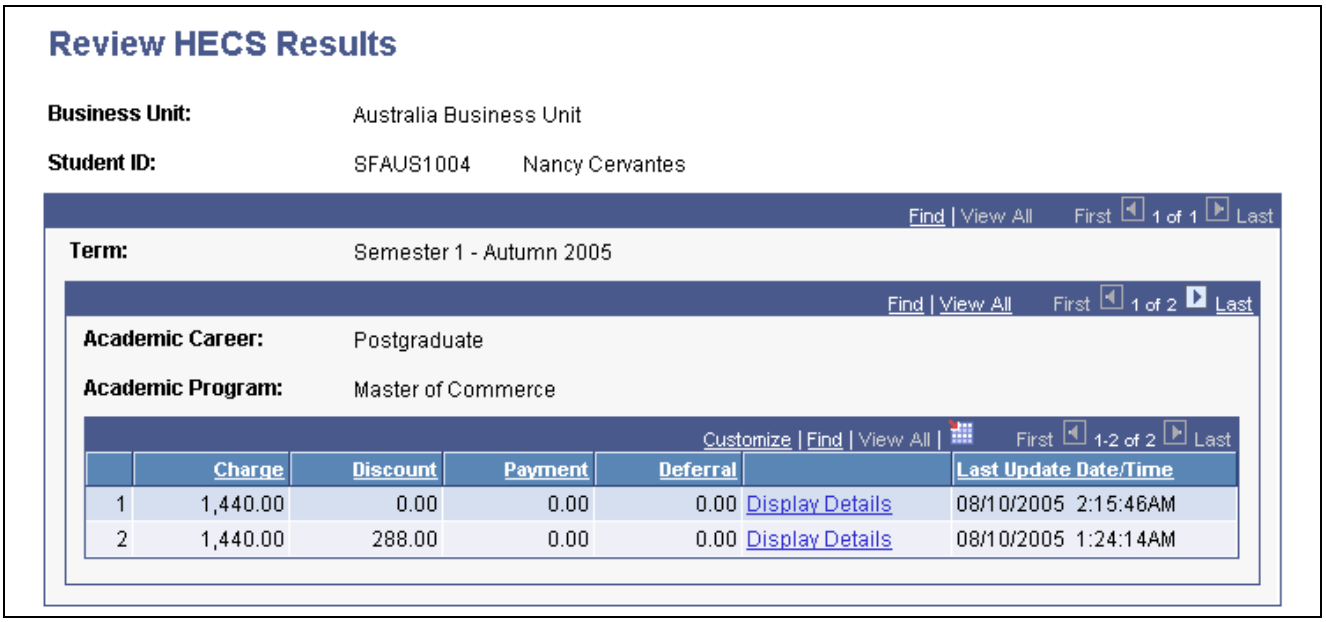
Pages Used to Review HECS Results and Run the HECS Reconciliation

Page Name	Definition Name	Navigation	Usage
Review HECS Results	SF_STDNT_HECS	Student Financials, Tuition and Fees, Australian Loan Processing, Review HECS Results	Review HECS results.
Review HECS Results Class Prices	SSF_HECS_DETAIL_SP	Click the Display Details link to access the Review HECS Results Class Prices page.	Review HECS results class prices.
HECS Reconciliation	SSF_RUN_SFPBHECS	Student Financials, Tuition and Fees, Australian Loan Processing, Process HECS Reconciliation, HECS Reconciliation	Reconciling HECS on the census date

Reviewing HECS Results

Access the Review HECS Results page (Student Financials, Tuition and Fees, Australian Loan Processing, Process HECS Reconciliation, Review HECS Results).



Review HECS Results page

This page shows the charge and any discount, payment, or deferral amount that is associated with that charge. Click the Display Details link to show the class number and description, the liability status, and the individual charge amounts for that class.

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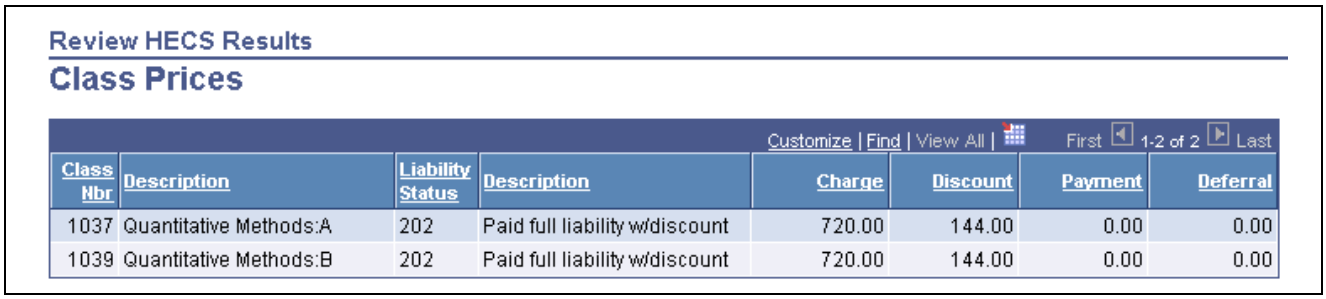


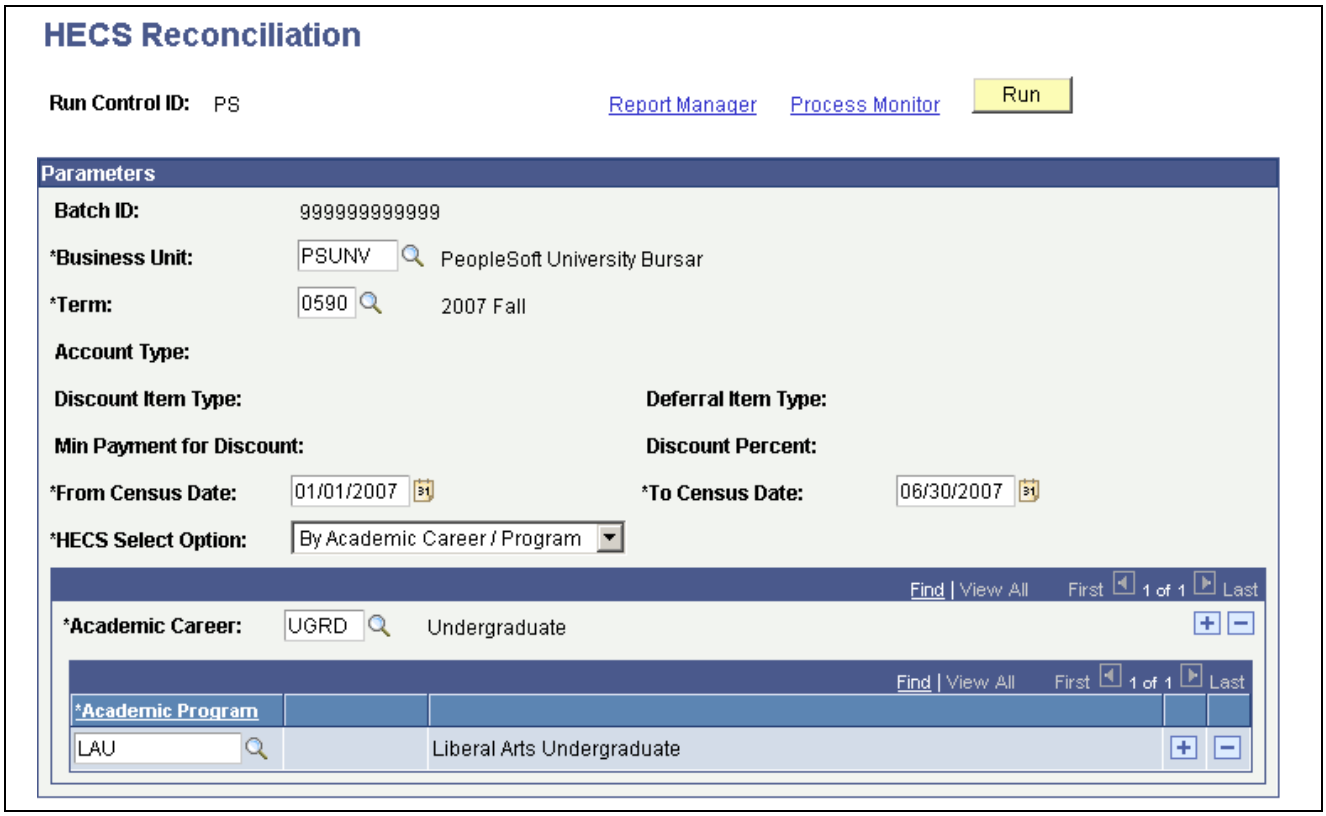
Class Nbr	Description	Liability Status	Description	Charge	Discount	Payment	Deferral
1037	Quantitative Methods:A	202	Paid full liability w/discount	720.00	144.00	0.00	0.00
1039	Quantitative Methods:B	202	Paid full liability w/discount	720.00	144.00	0.00	0.00

Review HECS Results Class Prices page

This page displays the class number and description, the liability status, and the individual charge amounts for that class.

Reconciling HECS on the Census Date

Access the HECS Reconciliation page (Student Financials, Tuition and Fees, Australian Loan Processing, Process HECS Reconciliation, HECS Reconciliation).



HECS Reconciliation page

This page displays the results of HECS reconciliation: the fees charged, payments, deferrals, and discount amounts.

The Reconciliation process reconciles the HECS payments and deferrals as of the census date. If a student has indicated he will pay his full Student Contribution, but as of the census date he has not, this process will change the student's exemption status to deferred or partial payment and remove the full 20 percent discount. The program will then apply any discounts applicable to the partial payment. This process also creates discount and deferral waivers based on the amount of payment as of the census date. You should run this process on the census date, after all of the students' payments are entered in Student Financials.

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Parameters

Account Type	Displays the account type to be used when processing. The value that appears is the value that you entered on the Loan Default page.
Discount Item Type	Displays the item type that you assigned for the HECS discount. The value that appears is the value that you entered on the Loan Default page.
Deferral Item Type	Displays the item type that you assigned for the HECS deferral amount. The value that appears is the value that you entered on the Loan Default page.
Discount Percentage	Displays the percentage of Student Contribution that a student must pay to receive the HECS discount. The value that appears is the value that you entered on the Loan Default page.
HECS Select Option	Select *By Academic Career/Program* to run the process for a career. The Academic Career and Academic Program fields become available for entry to run the process for one or more careers and one or more programs. Select *By Student ID* to add student IDs to run the process for one or more students.

Creating and Updating FEE-HELP Loans

This section provides an overview of FEE-HELP loans and discusses how to:

- Create and update FEE-HELP loans.
- Using FEE-HELP process rules.
- Update statuses for FEE-HELP determinations.

Understanding FEE-HELP Loans

FEE-HELP loans help students who are paying full fees in public and eligible private HEPs. Before you create or update FEE-HELP, the following business processes must be completed:

- CHESSN allocation.
- Student eligibility for FEE-HELP.

See Also

lscc, (AUS) Managing CHESSN Data Storage

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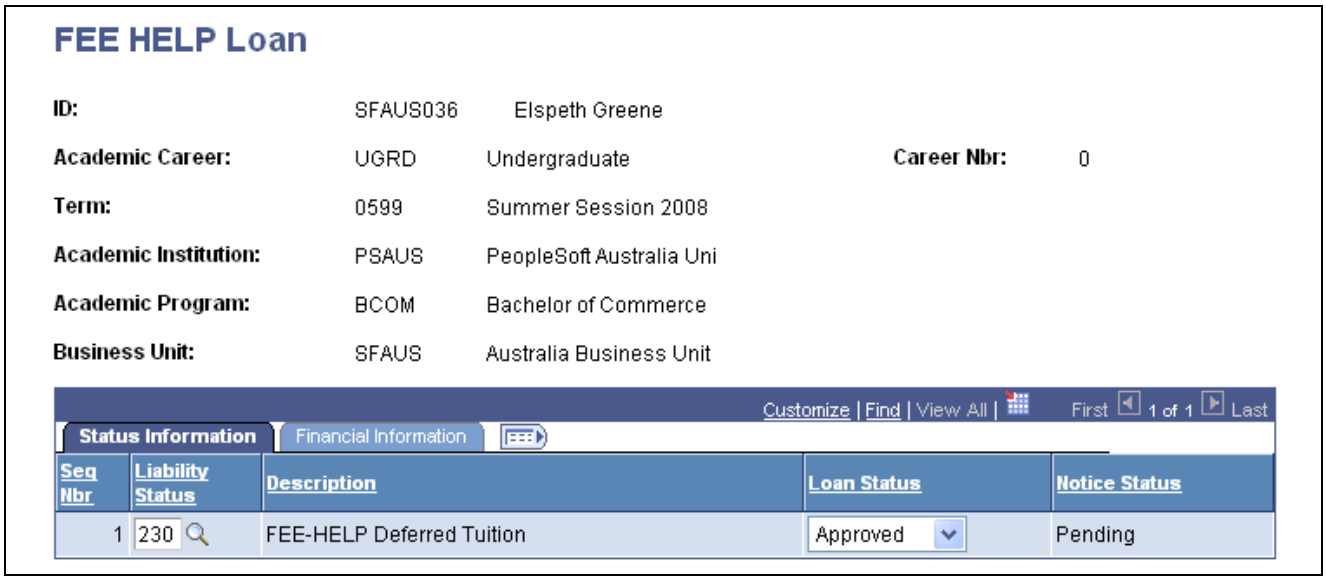
Pages Used to Create and Update FEE-HELP Loans

Page Name	Definition Name	Navigation	Usage
FEE-HELP Loan,	SSF_STDNT_LN_AUS	Student Financials, Tuition and Fees, Australian Loan Processing, Maintain FEE-HELP Loan, FEE-HELP Loan	Create and update FEE-HELP loans.
FEE-HELP Determination	SSF_RUN_SFPBFHLP	Student Financials, Tuition and Fees, Australian Loan Processing, Process FEE-HELP Determination, FEE-HELP Determination	Update statuses for FEE HELP determinations.

Creating and Updating FEE-HELP Loans

Access the FEE HELP Loan page (Student Financials, Tuition and Fees, Australian Loan Processing, Maintain FEE-HELP Loan, FEE-HELP Loan).



FEE HELP Loan page

Use this page to add the loan and set or change the status (both the liability and the loan status).

Status Information

Use the Status Information tab to add the loan and set the status.

Financial Information

Access the FEE HELP Loan page. Select the Financial Information tab.

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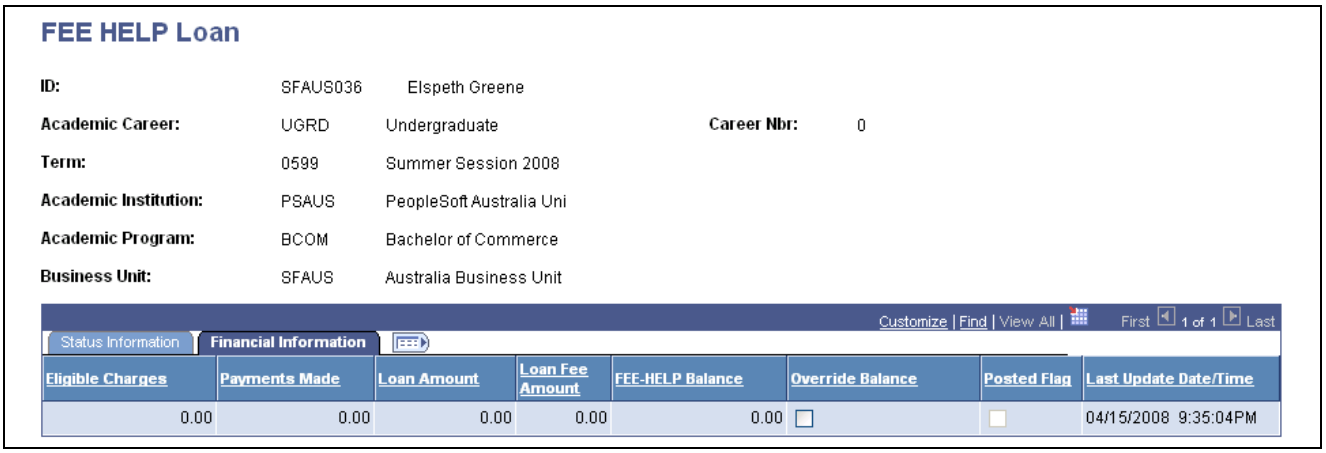
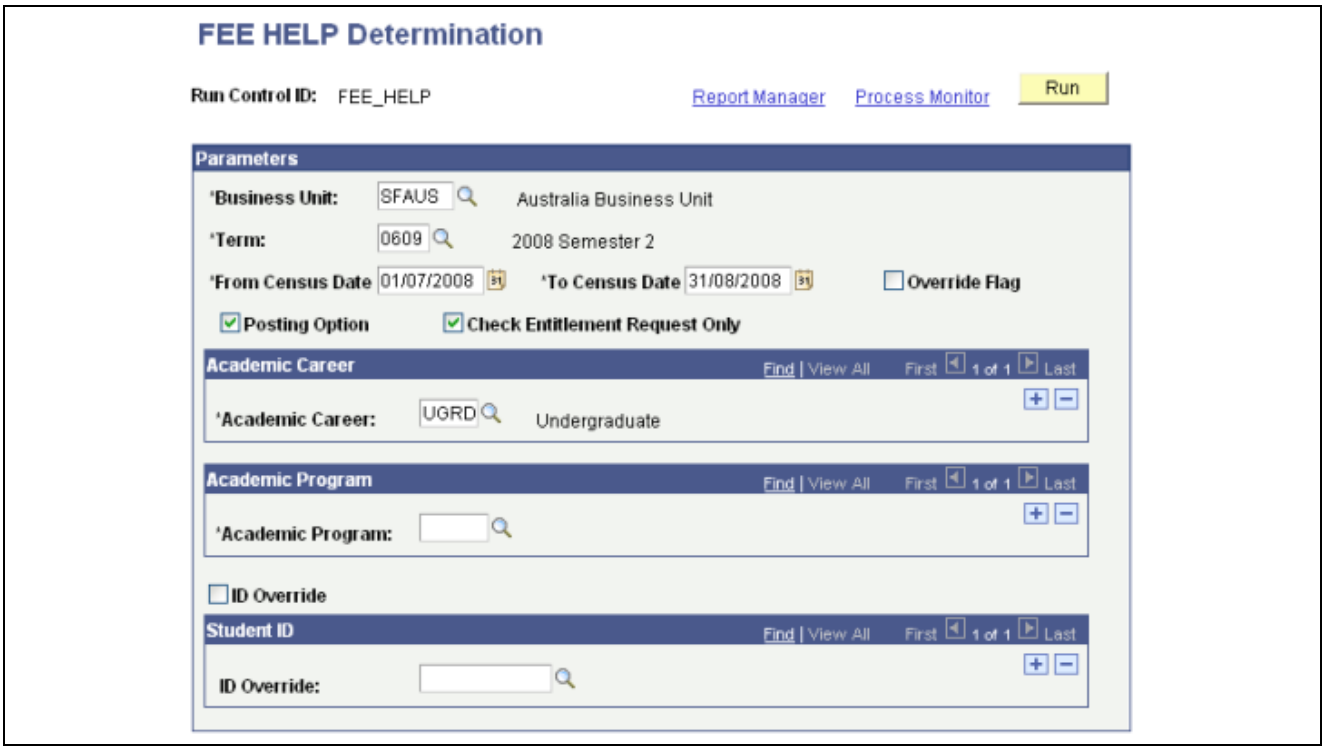


FEE HELP Loan page - Financial Information tab

The Financial Information tab displays the eligible charges, any payments that have been made, the loan amount, the loan fee amount, the posted flag, and the last update date and time.

Updating Statuses for FEE HELP Determinations

Access the FEE HELP Determination page (Student Financials, Tuition and Fees, Australian Loan Processing, Process FEE-HELP Determination, FEE HELP Determination).



FEE HELP Determination page

The FEE-HELP Determination process is run before the census date to process and post the FEE-HELP loan to the student's account (and pay the eligible charges). The FEE-HELP Determination process must be run; otherwise, the loan will not appear on the CAN.

From Census Date and **To Census Date** Select the census date range to restrict the selection of classes by census date. Where there are multiple census dates within the term of processing, the

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census date range allows you to apply FEE-HELP deferrals to classes with earlier census dates, allowing student time to make a decision on payment for classes within census dates later in the term.

Note. It is imperative that your increment the To Census Date on the run control when including later census dates in the term. The From Census Date parameter must include all dates within the term for which you have run deferral processing. For example, if you have two census dates in the term – 1 July and 31 August and you have run the process for Census Date 1 July, you must include 1 July in the date range when you are ready to include the second census date in August. The Override Flag check box still allows you to defer only those classes for which the census date is not past.

Posting Option	Select to post the loan to the student account. If you clear this check box, the loan will not post to the student account.
Override Flag	Select to override the census date criteria (if you are running the process after the census date has passed).
ID Override	Select to enter a specific ID (or multiple IDs) to process.
Academic Career	Select the careers to process.
Academic Program	Select the programs to process for specific careers.
ID Override	This is used in conjunction with the ID Override check box. Enter the IDs to process.

Understanding FEE-HELP Process Rules

To determine whether a FEE-HELP deferral will occur and for what amount, it is important to understand the FEE-HELP Entitlement attributes for the student:

- Entitlement check on the Student CHESSN record.
- Balance Override check box on Student Loan Record.
- Entitlement only check box on the process run control.

The combination of these attributes determines how the process assesses the student.

Note. If the student does not have a CHESSN record, no deferral occurs.

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Student CHESSN Record Entitlement check box	Student FEE-HELP Loan Record Override Balance check box	FEE-HELP Process Run Control – Entitlement Request check box	FEE-HELP Deferral (pending FEE-HELP balance available)	FEE-HELP Balance Used (reflected in FEE-HELP balance field on student loan record for row inserted)
On	On	Off	Yes	Override balance entered on fee-help loan record (max row). If amount is 0.00, no deferral occurs.
On	Off	Off	Yes	FEE-HELP balance from CHESSN Record. If amount is 0.00, no deferral occurs.
Off	Off	On	No	No deferral because there is no entitlement record.
Off	On	On	Yes	Override balance entered on fee-help loan record (max row). If amount is 0.00, no deferral occurs.
On	Off	On	Yes	FEE-HELP balance from CHESSN Record. If amount is 0.00, no deferral occurs.
Off	On	Off	Yes	Override balance entered on fee-help loan record (max row). If amount is $0.00, no deferral occurs.
On	On	On	Yes	FEE-HELP Limit from CHESSN Record. If this is 0.00 no deferral.
Off	Off	Off	Yes	FEE-HELP Limit from CHESSN Record. If this is 0.00 no deferral.
No record	On	On	No	No CHESSN Record. Student skipped. Row is inserted in fee-help loan record and FEE-HELP balance override reverted to $0.00.

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Student CHESSN Record Entitlement check box	Student FEE-HELP Loan Record Override Balance check box	FEE-HELP Process Run Control – Entitlement Request check box	FEE-HELP Deferral (pending FEE-HELP balance available)	FEE-HELP Balance Used (reflected in FEE-HELP balance field on student loan record for row inserted)
No record	On	Off	No	No CHESSN Record. Student skipped. Row is inserted in fee-help loan record and FEE-HELP balance override reverted to $0.00.
No record	Off	On	No	No CHESSN record. Student skipped.
No record	Off	Off	No	No CHESSN record. Student skipped.

Processing Rules Where the Limit is Less Than the Eligible Charge

If a student has eligible charges in excess of the available FEE-HELP balance, application of the FEE-HELP balance is applied first to classes with the earliest census date and then to the most expensive units of study. This is in accordance with the HEIMS order of precedence for entitlement consumption.

Example 1

Assume the student has a FEE-HELP balance available of 1,000 AUD and enrolls in Class A with a census date of 31 March 2007. Tuition fees for Class A are 2,000 AUD.

When the FEE-HELP process is run, it defers Class A in part for $1,000.00. This results in a balance of 1,000 AUD remaining for payment.

The student subsequently enrolls in Class B also with a census date 31 March 2007. Tuition fees for Class B are 2,500 AUD.

When the FEE-HELP process runs, if the student has not made any payments, the deferral of 1,000 AUD swaps to apply to Class B, the more expensive class.

Example 2

Assume the student has a FEE-HELP balance available of 1,000 AUD and enrolls in Class A with a census date 31 March 2007. Tuition fees for Class A are 2,000 AUD.

When the FEE-HELP process runs, it defers class A in part for 1,000 AUD. This results in a balance of 1,000.00 AUD remaining for payment.

The student subsequently enrolls in Class B, which is scheduled in the same term as Class A, but has a census date 15 March 2007. Tuition fees for Class B are also 2,000 AUD.

When the FEE-HELP process runs, if the student has not made any payments, the deferral of 1,000 AUD swaps to Class B, the class with the earliest census date.

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Creating and Updating OS-HELP Loans

This section provides an overview of OS-HELP loans and discusses how to maintain OS-HELP loans.

OS-HELP loans help students who decide to take part of their study overseas. Before you create or update OS-HELP, the following business processes must exist:

- The student is not in his or her first or last year of study.
- The student is eligible and has an activated CHESSN.

See Also

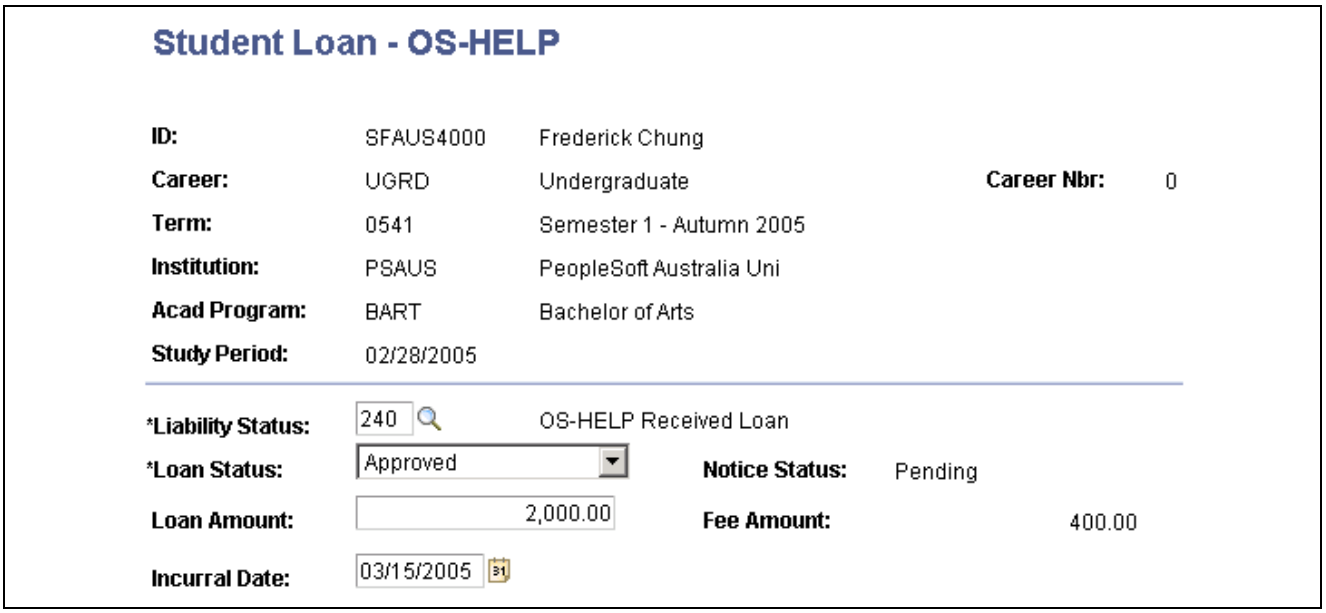
lscc, (AUS) Managing CHESSN Data Storage

Page Used to Create and Update OS-HELP Loans

Page Name	Definition Name	Navigation	Usage
Student Loan - OS HELP	SSF_STDNT_LN_OS	Student Financials, Tuition and Fees, Australian Loan Processing, Maintain OS HELP Loan, Student Loan - OS HELP	Maintain OS–HELP loans.

Maintaining OS-HELP Loans

Access the Student Loan - OS-HELP page (Student Financials, Tuition and Fees, Australian Loan Processing, Maintain OS HELP Loan, Student Loan - OS HELP).



Student Loan - OS-HELP page

Use this page to create OS loans. You can start the loan as *Pending* (until you receive further information), and then change it to *Approved* (or *Denied)* according to information that you receive.

Liability Status Enter the appropriate liability status for this student.

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Loan Status	Change the loan status based on the information that you receive about this student.
Notice Status	Displays the status of the CAN. Possible statuses are: *Reported to DEST* *Pending* *Ready* *Sent* *Variation Required*
Loan Amount and **Fee Amount**	Enter the OS-HELP loan payment to be made to the student. The corresponding fee amount is calculated and displayed based on the percentage loan fee configured for the academic career on the OS-HELP setup page.
Incurral Date	Enter the date that the loan was processed.

Creating and Updating SA-HELP Loans

This section discusses how to:

- Maintain SA-HELP loans.
- Run the SA-HELP Deferral process.
- Review SA-HELP Deferral results.
- Review SA-HELP Deferral messages.

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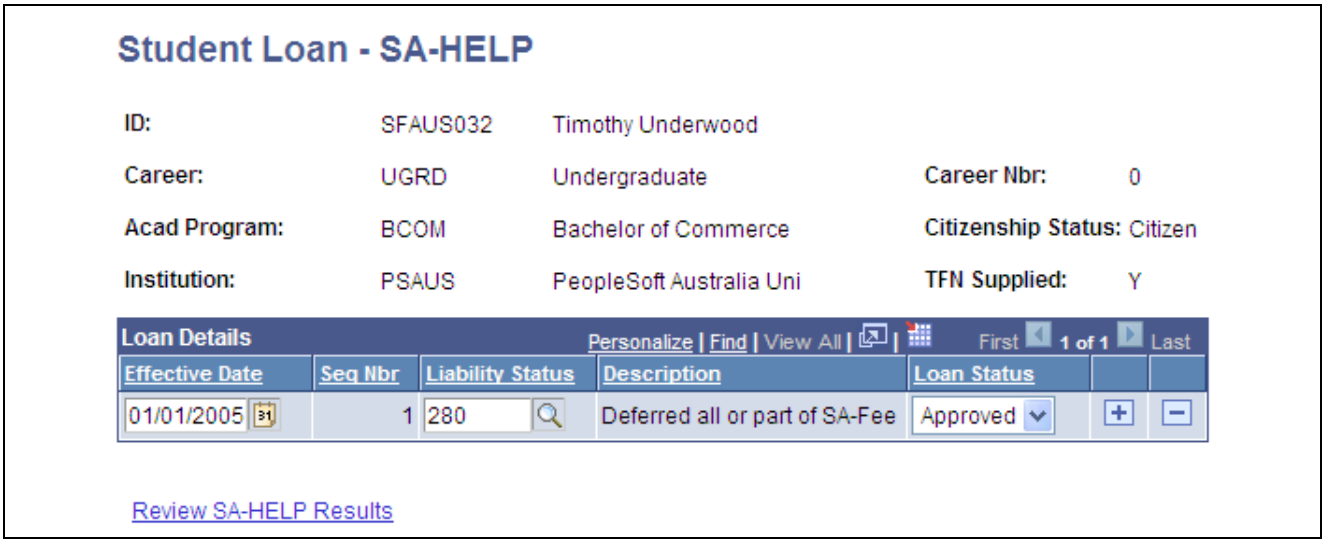
Pages Used to Create and Update SA-HELP Loans

Page Name	Definition Name	Navigation	Usage
Student Loan - SA-HELP	SSF_STDT_SA_LN_AUS	Student Financials, Tuition and Fees, Australian Loan Processing, Maintain SA-HELP Loan, Student Loan - SA-HELP	Create and update SA-HELP loans.
Process SA-HELP Deferral	SSF_RUN_SAH_DEF	Student Financials, Tuition and Fees, Australian Loan Processing, Process SA-HELP Deferral, Process SA-HELP Deferral	Run the SA HELP Deferral process for multiple or individual students.
Review SA-HELP Results	SSF_SAHELP_RES	Student Financials, Tuition and Fees, Australian Loan Processing, Review SA-HELP Results, Review SA-HELP Results	Review the SA-HELP deferral results.
Bundle 30 **New page** Review SA-HELP Messages	SSF_SAH_LOG_MSGS	Student Financials, Tuition and Fees, Australian Loan Processing, Review SA-HELP Messages	Review messages after you run the SA-HELP Deferral process.

Maintaining SA-HELP Loans

Access the Student Loan - SA-HELP page (Student Financials, Tuition and Fees, Australian Loan Processing, Maintain SA HELP Loan, Student Loan - SA-HELP).



Student Loan - SA-HELP page

Use the Student Loan - SA-HELP page to create SA-HELP loan records manually. These records are used by the SA-HELP Deferral process.

It is expected that individual institutions modify their CAF/eCAF process to automatically populate these records during a student's initial program enrolment. This is not delivered functionality. Once they are set, the Liability Status and Loan Status are unlikely to change during a student's program enrolment.

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Review SA-HELP Results Click this link to access the Review SA-HELP Results page and view the Student Amenities Fee SA-HELP loans records created by the SA-HELP Deferral process.

Running the SA-HELP Deferral Process

Access the Process SA-HELP Deferral page (Student Financials, Tuition and Fees, Australian Loan Processing, Process SA-HELP Deferral, Process SA-HELP Deferral).

Process SA-HELP Deferral page

Item Type Group and **Deferral Item Type** The values in these fields appear based on the setup on the Loan Default - SA-HELP page.

Override Flag If you select this check box, the process overrides the Due Date logic when it selects fee records and loan records and includes SA fees charged and payments made after the Due Date for the Term/Session.

Posting Option **Bundle 30**

If you select this check box, the process posts the fee balance to the Deferral Item Type, writes a record to the SA-HELP Results table, and displays the process output in the Review SA-HELP Messages page.

Clear the check box if you want to run the process in *test* mode—the process then only displays the output in the Review SA-HELP Messages page.

From Due Date and **To Due Date** The date range is used to identify the Term and Session(s) based on the Due Dates defined on the Loan Default - SA-HELP page.

See [PeopleSoft Student Financials 9.0 PeopleBook]Defining SA-HELP Loan Defaults.

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Understanding the SA-HELP Deferral Process

Process SA-HELP Deferral (SSF_SAH_DEF) is an Application Engine process. It finds all the charges—the SA Fees that are available under the Item Type Group set up on the Loan Default SA-HELP page—for the Term that you enter on the Process SA-HELP Deferral page. For each transaction, the process looks for any payments/waivers/scholarships on the Student Account. The difference between the charges and the total payments is the SA Fee Balance. If the balance is greater than zero and the Loan Status value on the Maintain SA-HELP page is *Approved*, the amount is deferred to the Deferral Item Type set up on the Loan Default page.

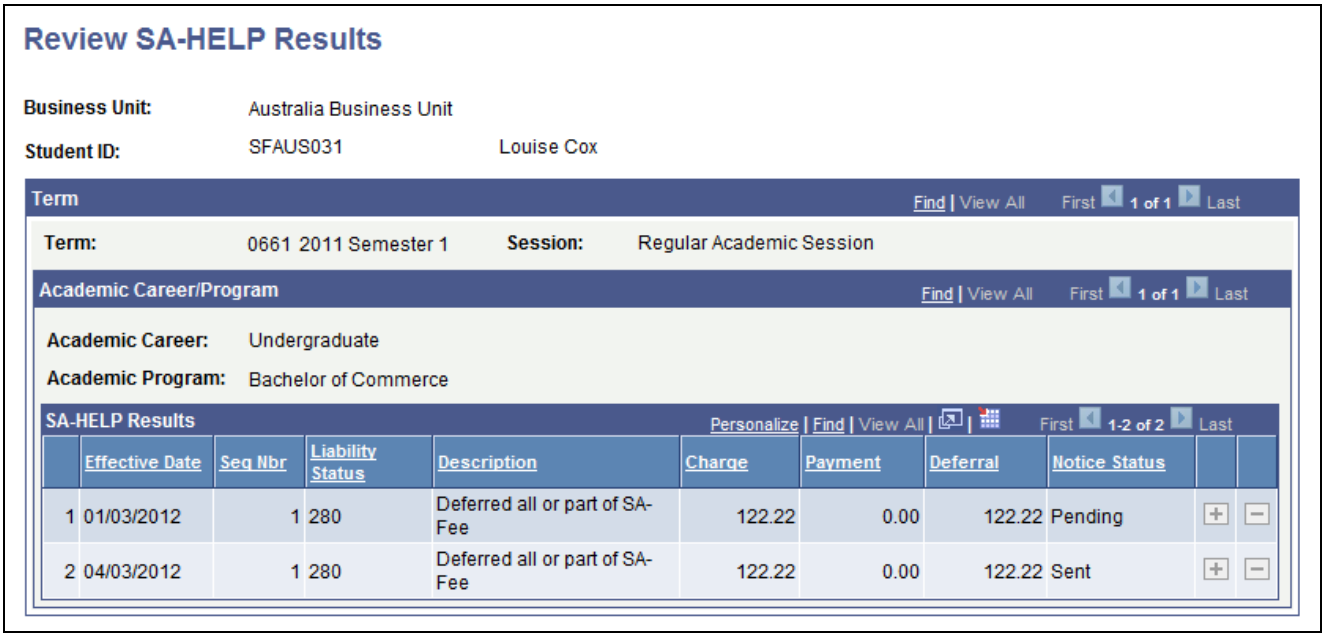
If a student loan has a successful deferral and a subsequent run of the deferral process for the same term/session finds that the student no longer has an approved SA-HELP Loan record, the deferral is reversed.

The results of the SSF_SAH_DEF process are available on the Review SA-HELP Results page.

Note. The SA-HELP Deferral process is run after the Term/Session due date to process and post the SA-HELP loan to the student's account (and pay the eligible charges). The SA-HELP Deferral process must be run in order for the loan to appear on the CAN.

Reviewing SA-HELP Deferral Results

Access the Review SA-HELP Results page (Student Financials, Tuition and Fees, Australian Loan Processing, Review SA-HELP Results, Review SA-HELP Results).



Review SA-HELP Results page

View the Student Amenities Fee SA-HELP loan records created by the SA-HELP Deferral process.

Notice Status

The Notice Status field defaults to *Pending* after the SA-HELP Deferral process is run and then is updated to *Sent* by the CAN process.

See [PeopleSoft Student Financials 9.0 PeopleBook]Creating Commonwealth Assistance Notices.

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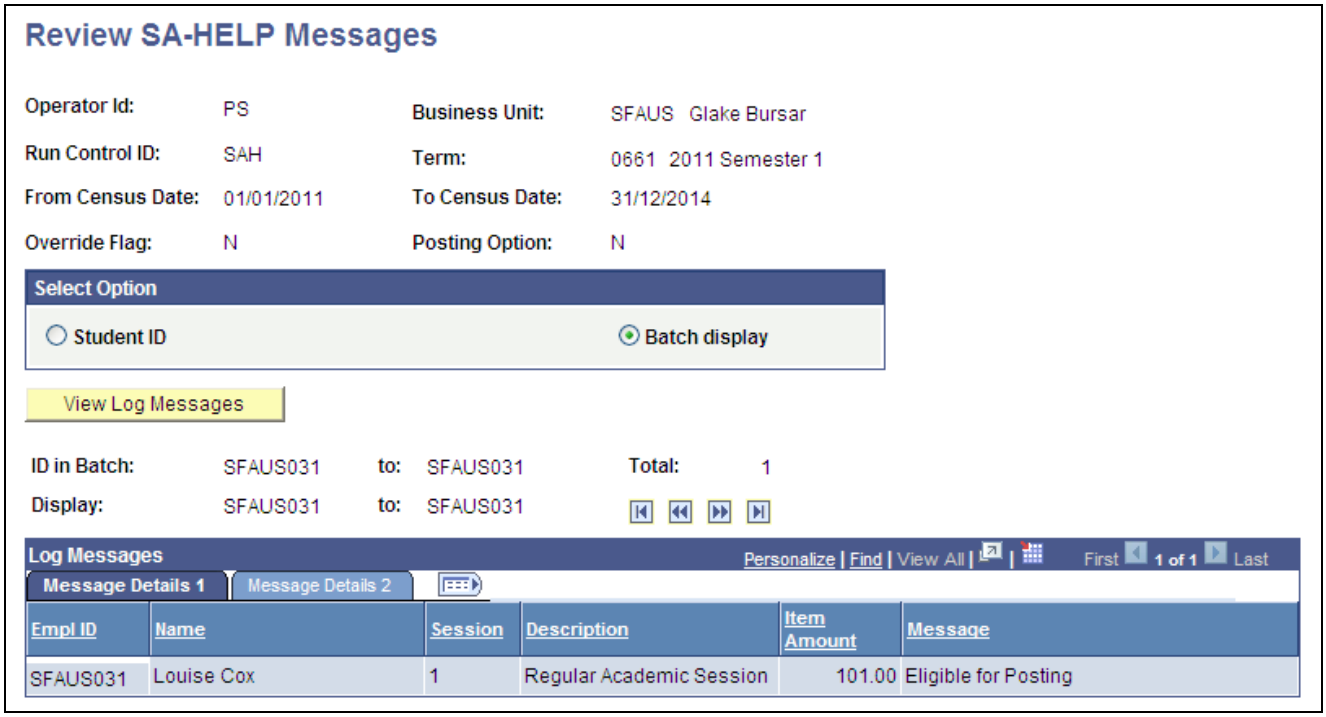
Reviewing SA-HELP Deferral Messages

Bundle 30
New

Access the Review SA-HELP Messages page (Student Financials, Tuition and Fees, Australian Loan Processing, Review SA-HELP Messages).



Review SA-HELP Messages page

View the messages generated by the SA-HELP Deferral process.

Creating Commonwealth Assistance Notices

Create the CAN after the census date to notify students of their liabilities (the loans they have secured, the amounts, and the courses). This notice must be provided to all students who are Commonwealth-supported or Commonwealth-assisted.

This section discusses how to create or update commonwealth assistance notices.

Page Used to Create Commonwealth Assistance Notices

Page Name	Definition Name	Navigation	Usage
Commonwealth Assistance Notice	SSF_RUNCTL_CAN	Student Financials, Tuition and Fees, Commonwealth Assistance Notice	Create or update Commonwealth Assistance Notices.

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Creating or Updating Commonwealth Assistance Notices

Access the Commonwealth Assistance Notice page (Student Financials, Tuition and Fees, Commonwealth Assistance Notice).

Commonwealth Assistance Notice page

Reprint

Use this check box to toggle printing.

Select Reprint to re-create all of the CAN data.

Clear Reprint to re-create data only for those students who have made changes since the previous run.

For instance, if you ran the CAN process yesterday and then you run it today with Reprint cleared, the CAN process will print only the students whose data changed since the last run.

Group Boxes

You can enter information in any or all of the group boxes to define the group for which you want the CAN printed. If you leave all of the group boxes blank, you will get all students who have HECS-HELP, FEE-HELP, OS-HELP, or SA-HELP.

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