CHAPTER 1

Setting Up Fees and Tuition Groups

You charge fees to students for everything from application to graduation. You define each of those fees and establish rules for how they will be applied and to whom. Tuition groups enable you to assess fees to large groups of students who share attributes.

Bundle 30. Added type of fees that support and do not support ITEM_SF installments

Fees may or may not support ITEM_SF installments. Fees that support ITEM_SF installments are: administrative, term, transaction, class, course, course list, and optional. Fees that *do not* support ITEM_SF installments are: application, deposit, and ANZ fees within tuition calculation. While application fees use the same billing and due date calendar as the tuition calculation process, application fees are not processed by tuition calculation. Deposit fees have their own due date calendar and are not processed by tuition calculation. The ANZ per credit charge fee is used by NZQA processing, and HECS fees are used by AUS. If any one of the ANZ flags, SCC_AUS_DEST or SCC_NZL_NZQA, on the INSTITUTION table is enabled, all fees from tuition calculation will *not* create ITEM_SF installments.

This chapter discusses how to:

- Set up fee classes.
- Define minimum and maximum fees.
- Set up application fees.
- Set up deposit fees and deposit due dates.
- Set up term fee codes.
- Set up course fees and class fees.
- Define optional fees.
- Set up transaction fees.
- Set up course list fees.
- Set up tuition groups.

See Also

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

Setting Up Fee Classes

To set up fee classes, use the Fee Classes component (FEE_CLASS).

You use fee classes for reporting purposes and grouping fees. For example, you might have a variety of item types that you want to organize under the fee class of Mandatory Tuition and Fees. That way, you can produce a report that shows all mandatory fee item types. Fee class codes are required for term fee setup.

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Page Used to Set Up Fee Classes

Page Name	Definition Name	Navigation	Usage
Fee Classes	FEE_CLASS_TBL	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Fee Classes	Set up fee classes.

Defining Minimum and Maximum Fees

To set up minimum and maximum fees, use the Minimum / Maximum Fees component (MIN_MAX_FEE_PANEL).

This section provides an overview of minimum and maximum fees and discusses how to:

- Define minimum and maximum fees for billing careers and academic years.
- Define minimum and maximum fees for terms and sessions.
- Define minimum and maximum fees for admit terms.

Understanding Minimum and Maximum Fees

You can define a minimum and maximum range for all of your fees and charges. You can set fee ranges for sessions, terms, academic years, and billing careers so that they build off one another. Be sure to define enough minimum/maximum fee codes to meet all your needs. For example, a minimum/maximum fee code for application fees might require a career limit of 100 USD while a code for term fees might require a career limit of 60,000 USD.

Pages Used to Define Minimum and Maximum Fees

Page Name	Definition Name	Navigation	Usage
Minimum/Maximum Fees 1	MIN_MAX_FEE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Minimum / Maximum Fees, Minimum/Maximum Fees 1	Define minimum and maximum fees for billing careers and academic years.
Minimum/Maximum Fees 2	MIN_MAX_FEE_2	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Minimum / Maximum Fees, Minimum / Maximum Fees 2	Define minimum and maximum fees for terms and sessions.
Minimum/Maximum Fees 3	MAX_FEE_ADM_TERM	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Minimum / Maximum Fees, Minimum / Maximum Fees 3	Define minimum and maximum fees for admit terms.

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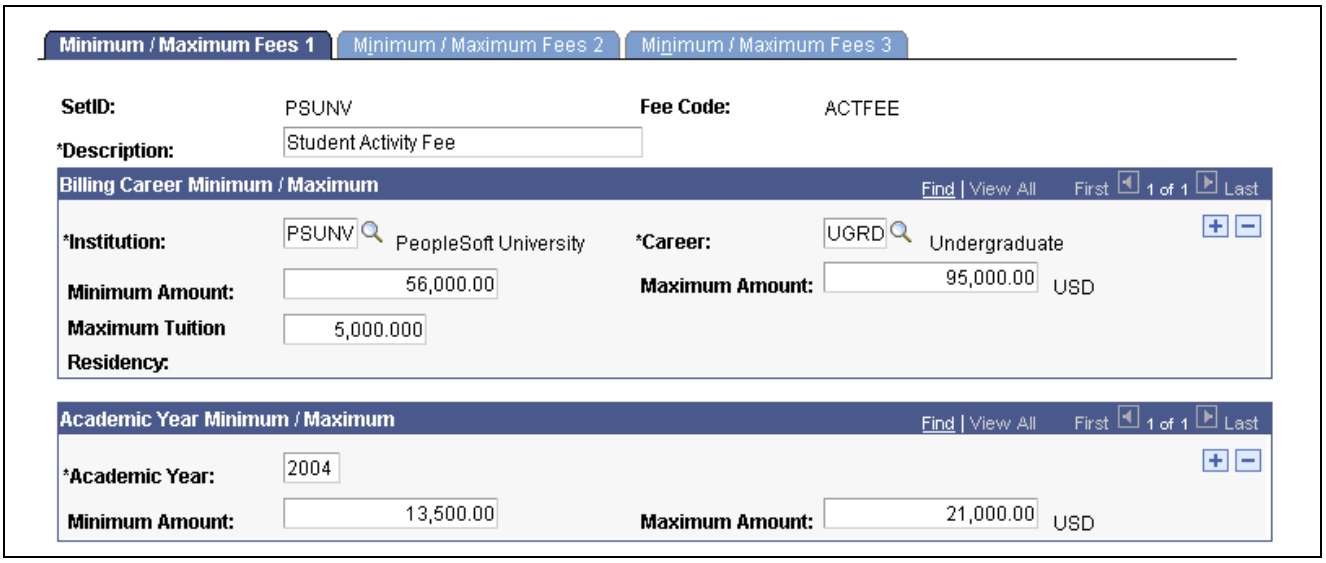
Defining Minimum and Maximum Fees for Billing Careers and Academic Years

Access the Minimum/Maximum Fees 1 page (Set Up SACR, Product Related, Student Financials, Tuition and Fees, Minimum / Maximum Fees, Minimum/Maximum Fees 1).



Minimum/Maximum Fees 1 page

Billing Career Minimum/Maximum

The system, by default, sets the student's billing career to the academic career in the student's career term record. The tuition calculation process uses the student's billing career to calculate the student's tuition.

If the student is active in more than one academic career in the same term, you might want to consolidate tuition calculation and billing under a single academic career. If so, then point the billing career for all of the student's career term records to the same academic career. For example, a student might be enrolled in a term as both a graduate student and an undergraduate student. If you wanted to consolidate tuition calculation to just the undergraduate career, you would select undergraduate as the billing career for both the student's undergraduate term record and graduate term record.

If you decide to use a single billing career for all of a student's academic careers within a term, note that to perform a term or session withdrawal, the student must be enrolled in at least one class within the academic career that you select as the student's billing career. Otherwise, the term withdrawal and session withdrawal processes halt processing and instruct you to change the student's billing career to an academic career in which the student has enrollments for the term.

Institution	Enter the institution that includes the career that you are defining.
Minimum Amount and **Maximum Amount**	Enter the minimum and the maximum amount to charge for the billing career.
Maximum Tuition Residency	Enter the maximum tuition residency for this career. This number represents the level of tuition residency, not the monetary amount that is charged.

Academic Year Minimum/Maximum

Enter an academic year and specify its minimum and maximum fees.

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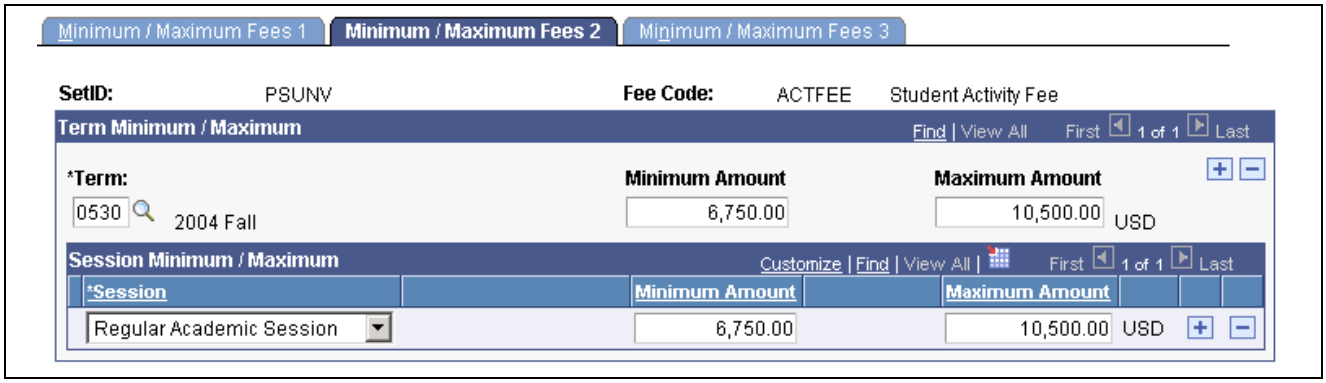
See Also

lssf, Setting Up Fees and Tuition Groups, Setting Up Term Fee Codes, Defining Tuition Residency Minimums and Maximums

Defining Minimum and Maximum Fees for Terms and Sessions

Access the Minimum/Maximum Fees 2 page (Set Up SACR, Product Related, Student Financials, Tuition and Fees, Minimum / Maximum Fees, Minimum/Maximum Fees 2).



Minimum/Maximum Fees 2 page

Term Minimum/Maximum

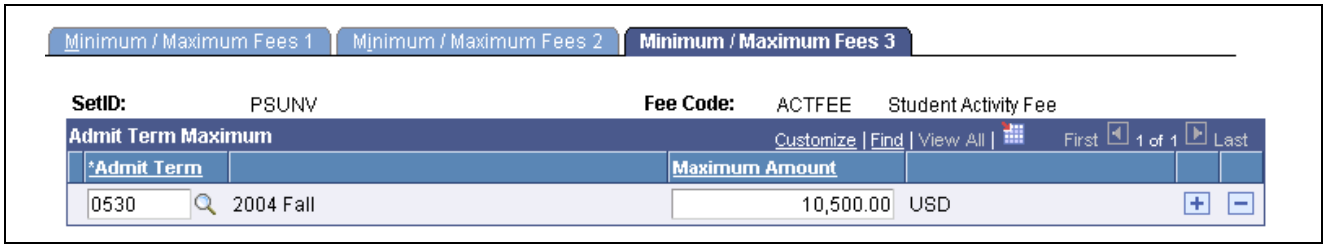
Enter an academic term and its minimum and maximum fees.

Session Minimum/Maximum

Enter an academic session and its minimum and maximum fees.

Defining Minimum and Maximum Fees for Admit Terms

Access the Minimum/Maximum Fees 3 page (Set Up SACR, Product Related, Student Financials, Tuition and Fees, Minimum / Maximum Fees, Minimum/Maximum Fees 3).



Minimum/Maximum Fees 3 page

Enter an admit term and its maximum amount.

Setting Up Application Fees

To set up application fees, use the Application Fees component (APPLICATION_FEES).

This section provides an overview of application fees and discusses how to:

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- Define application fees.
- Define application fee item types.
- Define application sub fees.

Understanding Application Fees

You must define the rules that your institution uses to assess application fees. Each application fee code that you define represents one or more individual fee charges (sub fees).

A one-to-one relationship exists between an application fee and an application center. You can define only one application fee for an application center. However, an application fee can have multiple sub fees. For example, you could charge different sub fees based on a student's admit type. Then, each admit type (for example, new students, transfer students, or readmitted students) would have its own application sub fee.

Each application fee code requires the definition of one or more sub fees that make up the charge. You can set up sub fees so that they are cumulative or mutually exclusive. You can also define a combination of cumulative and mutually exclusive fees. For example, you can define an application fee code with two sub fees: one sub fee charges students a fee of 50 USD to apply over the web and another sub fee charges students a fee of 75 USD to apply through the mail. While students can apply using both methods, it is unlikely that they would do so.

See Also

lsad, Building Your Recruiting Structure, Setting Up Your Recruiting Structure, Setting Up Application Processing Centers

Pages Used to Set Up Application Fees

Page Name	Definition Name	Navigation	Usage
Application Fees	APP_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Admission Fees, Application Fees	Define application fees.
Application Fee Item Types	APP_FEE_TBL_S1	Click the Application Fee Item Types link on the Application Fees page.	Define application fee item types.
Application Sub Fees	APP_SUBFEE_TABLE	Set Up SACR, Product Related, Student Financials, Admission Fees, Application Fees, Application Sub Fees	Define application sub fees.

Defining Application Fees

Access the Application Fees page (Set Up SACR, Product Related, Student Financials, Admission Fees, Application Fees).

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Application Fees page

Fee Class Select a fee class. Fee Class is a descriptive field that is used for reporting purposes only.

Copy Application Fee Click to copy an application fee and its sub fees from one term to the next.

Effective Term Select a term for the application fee. You must define an application fee for each term.

Maximum Amount Enter the maximum fee amount, including all sub fees, for a single application.

Minimum/Maximum Fee Code Select an optional minimum/maximum fee code.

Maximum fee code does not apply to AAWS application fee calculation.

Post to SF from App (post to Student Financials from application) Select to post the application fee to Student Financials as it is created. Do not post the application fee to the student's account when the payment is recorded.

When you select this option, the Application Fee Item Types link appears. Click it to open the Application Fee Item Types page. The first time that you select the check box, the page opens automatically.

If you select only this check box and do not select the Post to GL from AAWS App check box, the application fee item types that you set up cannot be used for AAWS fee processing.

Post to GL from AAWS App (post to General Ledger from Admissions Application Web Services application) Although application fees and payments are not posted to the student account for AAWS, but instead are sent directly to the general ledger, you must set up item types on the Application Fee component. These item types are used by Student Financials to derive the GL ChartFields.

When you select this check box, the Application Fee Item Types link appears. Click the link to access the Application Fee Item Types page where you define the item types associated with the AAWS fees and payment. The Waiver Item Type is not valid for AAWS.

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If you select only this check box and do not select the Post to SF from App check box, the application fee item types that you set up can be used only for AAWS fee processing.

To ensure that both AAWS and non-AAWS application fee payments are sent correctly to the general ledger, select both the Post to GL from AAWS App check box and the Post to SF from App check box.

Update App from SF (update application from Student Financials)

Select this option to automatically update the student's application status from Student Financials. When you select this option, the Update Application Fee Status from and to fields appear.

This field does not apply to AAWS application fee processing.

Update Application Fee Status from and **to**

Select the status that you want the system to change from and to. The options for both fields are *Pending*, *Received*, and *Waived*.

Note. If the student's original status is different than the option you select, the system does not change it. Consult with your admissions staff to determine the correct settings.

This field does not apply to AAWS application fee processing—for information about how the application fee status is updated for AAWS, refer to the Recruiting and Admissions PeopleBook.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1, Using GL Interface Processing, Generating Direct to GL Entries].

See [PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook - Update 1, Building Your Recruiting Structure, Setting Up Your Recruiting Structure, Setting Up Application Processing Centers].

See [PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook - Update 1, Adding and Updating Applications, Adding New Applications Manually, Entering Application Data].

See [PeopleSoft Recruiting and Admissions 9.0 PeopleBook]Managing Admission Transactions.

See [PeopleSoft Recruiting and Admissions 9.0 PeopleBook]Using Admission Applications Web Services.

See Also

lssf, Setting Up Fees and Tuition Groups, Defining Minimum and Maximum Fees

Defining Application Fee Item Types

Access the Application Fee Item Types page (click the Application Fee Item Types link on the Application Fees page).

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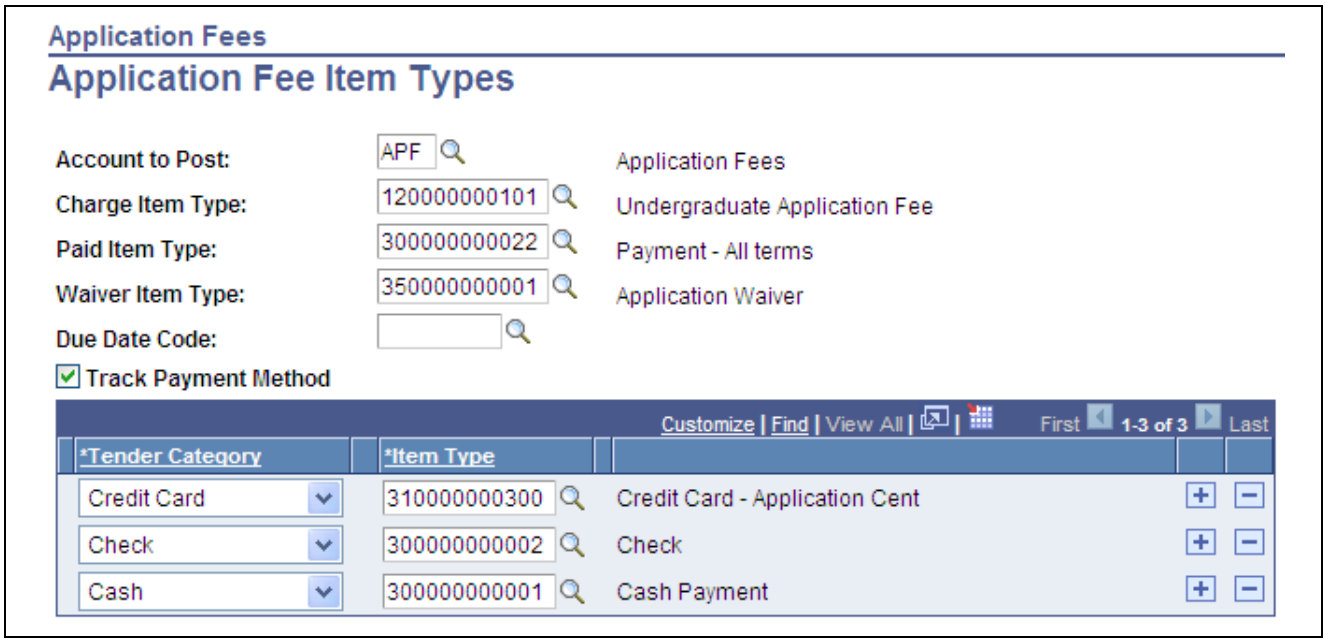

Application Fee Item Types page

This page has a dual purpose:

- To identify item types used for posting to the student account. Use the page for this purpose if application fees are *not* calculated in AAWS.
- To identify item types used for posting direct to the general ledger. Use the page for this purpose for AAWS application fees only.

Note. The fields outside of the Tender Category group box—which are required for posting to a student's account—do not apply to AAWS application fee processing.

Account To Post Enter the account type that you created for application fees.

Charge Item Type Enter the charge item type that you created for application fees. If you want to bill the student and post only the charge and not the payment, leave the Paid Item Type and Waiver Item Type fields blank.

Paid Item Type Enter the payment item type that you created for application fees.

Waiver Item Type Enter the waiver item type that you created for waiving application fees.

Due Date Code Select a code that determines when the application fee is due.

Note. The billing and due calendar must be set up with a pivot date of application date for a due date code to be available.

Track Payment Method Select to track the tender that is used to pay this fee for reconciliation purposes. This option is designed for real-time application processing where students walk in with their applications and have them processed at that time. When this option is selected, the Tender Category and Item Type fields become available.

Tender Category and **Item Type** Attach a tender category and item type. If you elect to track the payment method, you must attach the tender category and item type for each type of tender that you want to accept. If you do not include a specific tender category, it cannot be accepted in payment for application fees under this application

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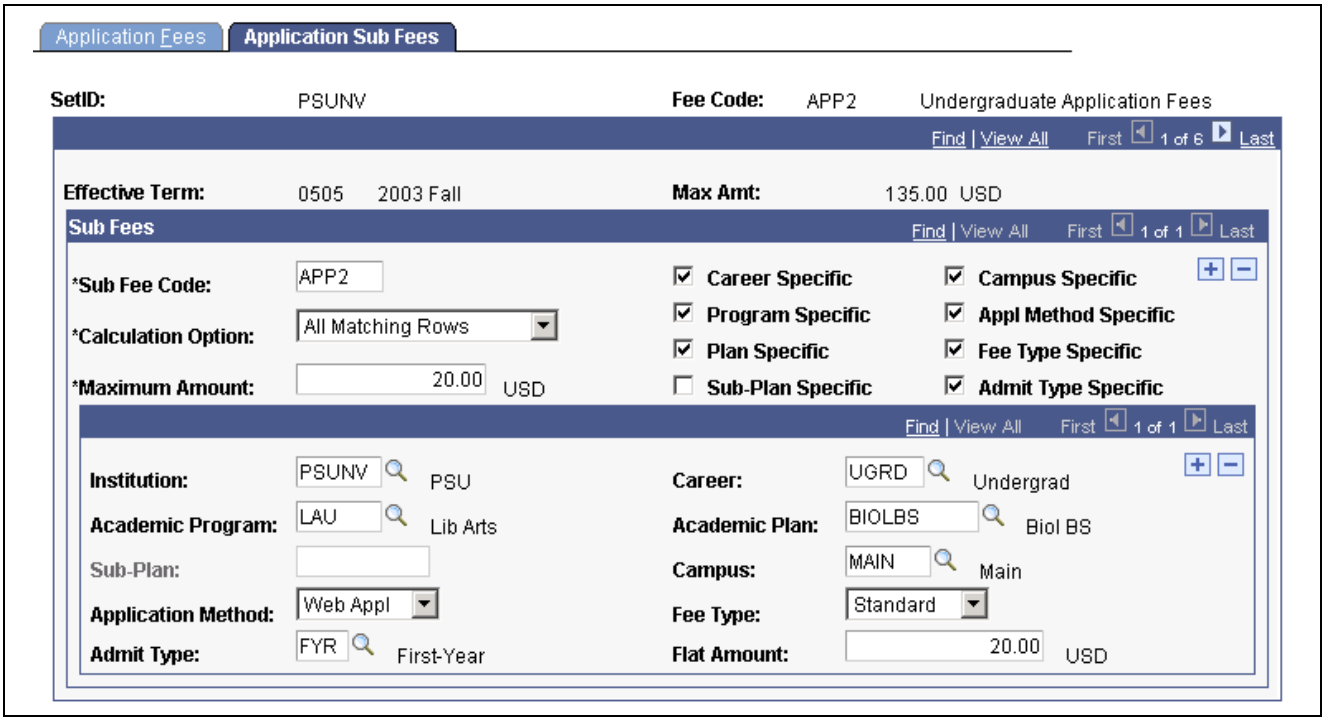
fee code. Using multiple tender categories also enables students to pay their application fees with a combination of tenders.

Defining Application Sub Fees

Access the Application Sub Fees page (Set Up SACR, Product Related, Student Financials, Admission Fees, Application Fees, Application Sub Fees).



Application Sub Fees page

Sub Fee Code Enter a code for the sub fee.

Calculation Option Select a calculation option. Values are:

All Matching Rows: Select to sum multiple sub fees that match the student's characteristics. For example, if you defined a sub fee of 60 USD for undergraduate students that submitted applications using the web and a sub fee of 40 USD for international undergraduate student applications, the system would charge 100 USD to students who meet both of these conditions.

Most Descriptive Row: Select to charge students the sub fee that most closely matches the application that they submitted. For example, if you charge a sub fee of 55 USD for undergraduate applications that were submitted by a service, and a 60 USD sub fee for undergraduate applications that were submitted using the internet, an undergraduate student that submitted an application using the internet would be charged 60 USD. The most descriptive row option works best for sub fees, such as the one in this example, that are mutually exclusive, as in this example. The system charges the first application sub fee that it recognizes. No way is available to prioritize which fee is charged.

Maximum Amount Enter the maximum amount for this sub fee.

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Note. The maximum amount of the sub fee cannot exceed the maximum amount of the application fee.

Maximum Amount does not apply to the AAWS application fee calculation.

Sub Fees

Use the check boxes on this page to select the criteria for the system to use when calculating the sub fee. When you select a check box, a corresponding field becomes available in the lower part of the page. Use this field to select a specific value for the calculation criterion. The fewer criteria that you select, the more broadly the system applies the fee.

Setting Up Deposit Fees and Deposit Due Dates

To set up deposit fees and deposit due dates, use the Deposit Fees component (DEPOSIT_FEES).

Some institutions require a deposit fee from accepted applicants to reserve space in an academic program.

This section discusses how to:

- Define deposit fees.
- Define deposit fee due dates.
- Define status changes resulting from deposits.

Pages Used to Set Up Deposit Fees and Deposit Due Dates

Page Name	Definition Name	Navigation	Usage
Deposit Fees	DEP_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Admission Fees, Deposit Fees	Define deposit fees.
Deposit Due Dates	DEP_DUE_DT_TABLE	Set Up SACR, Product Related, Student Financials, Admission Fees, Deposit Fees, Deposit Due Dates	Define deposit fee due dates.
Status Update	DEP_DUE_DT_SP	Click the Status Update link on the Deposit Due Dates page.	Define status changes resulting from deposits.

Defining Deposit Fees

Access the Deposit Fees page (Set Up SACR, Product Related, Student Financials, Admission Fees, Deposit Fees, Deposit Due Dates).

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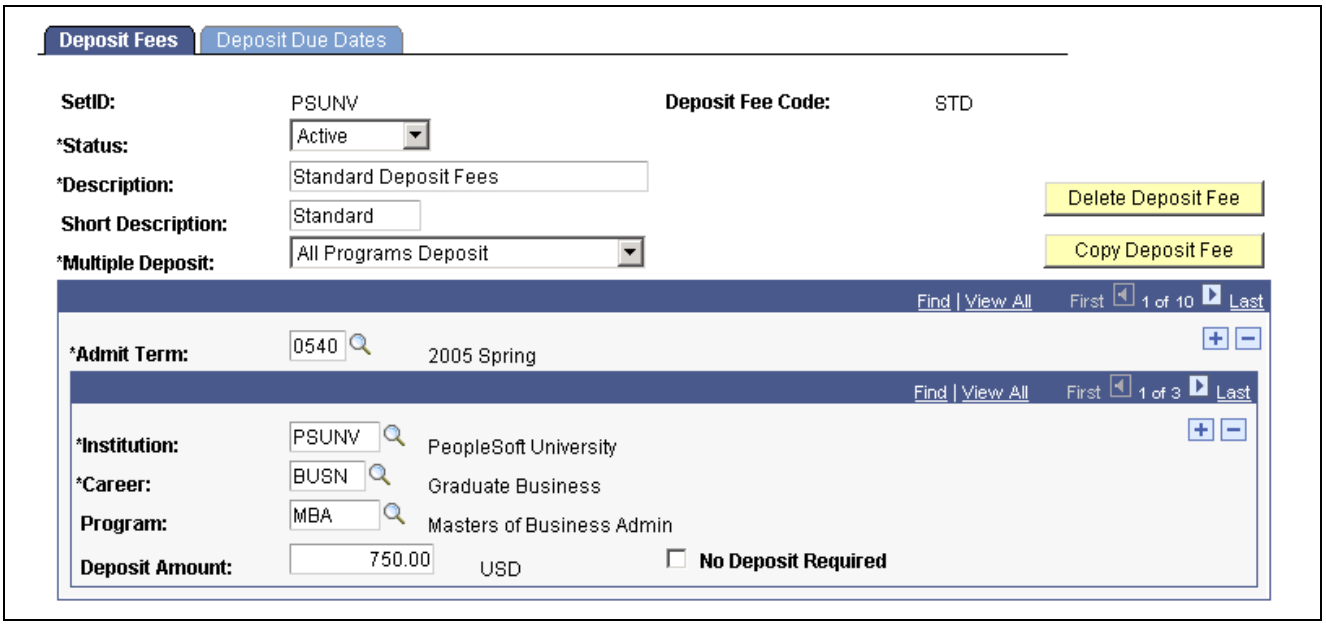

Deposit Fees page

Delete Deposit Fee Click to delete the deposit fee code.

Copy Deposit Fee Click to copy the deposit fee to a new term.

Multiple Deposits Specify how to calculate deposits for students who are enrolled in more than one program.

All Programs Deposit: Select to charge students a deposit fee for each program into which they are admitted.

First Program In: Select to calculate a deposit fee for the First Program *per*application number. If one application exists, and the student is admitted to multiple programs on that application, one deposit is calculated (as long as the admit rows are processed sequentially) for the first program to which the student is admitted. If more than one application exists, and the student is admitted to multiple programs on those applications, then a deposit is calculated for the first program admitted on *each* application.

Admit Term Enter the admit term to which the deposit fee applies.

Specifying Deposit Fees by Institution, Career, and Program

Select the institution, academic career, and academic program to which the deposit fee applies along with the deposit amount.

No Deposit Required Select to exclude the deposit fee all together. For example, if your institution recruits undergraduate Fine Arts students and admits them without requiring any deposit, define a row and select the option. If you specify a deposit amount of zero, a zero charge appears on the student's account. If you select this check box, no charge appears at all.

Defining Deposit Fee Due Dates

Access the Deposit Due Dates page (Set Up SACR, Product Related, Student Financials, Admission Fees, Deposit Fees, Deposit Due Dates).

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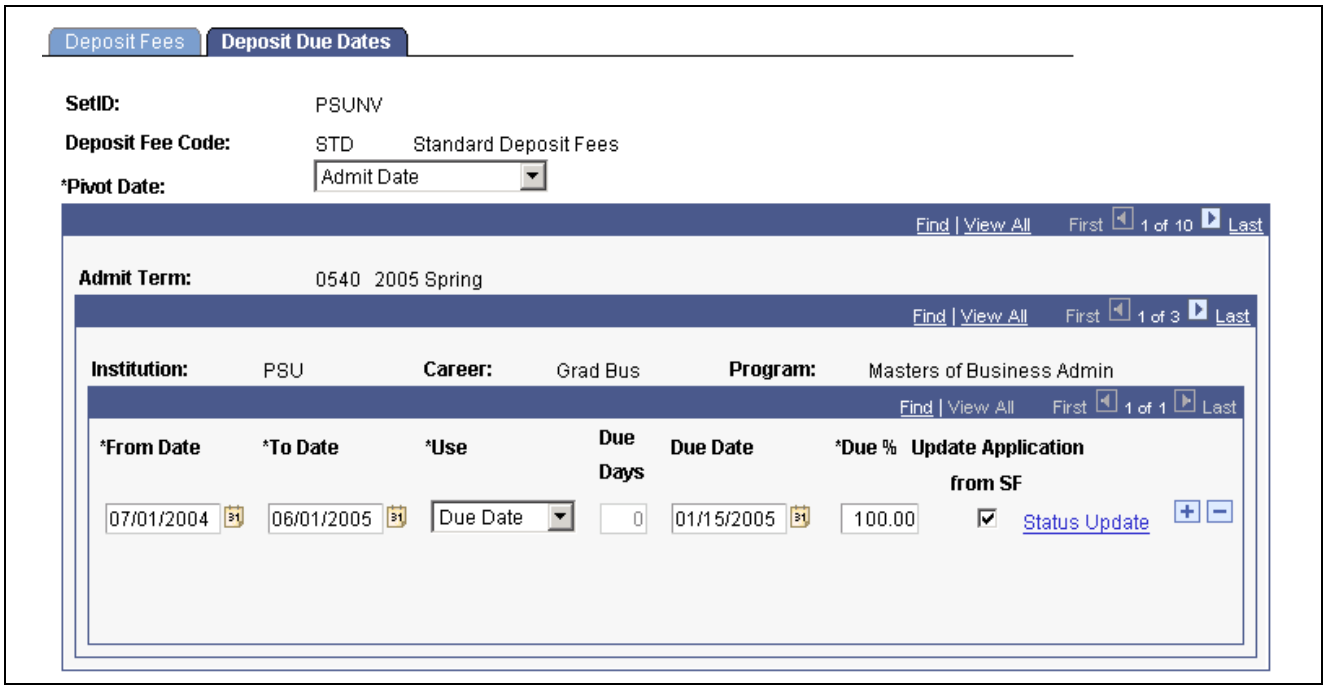

Deposit Due Dates page

Pivot Date	Select either *Admit Date* or *Application Date* as the pivot date that determines the starting point for calculating the deposit fee due date.
From Date and **To Date**	Enter the range of admission dates to which the deposit fee due date applies.
Use	Select either *Due Days* or *Due Date* for calculating the due date. The corresponding field becomes available.
Due Days	Enter the number of days after the pivot date that a deposit fee is due.
Due Date	Enter the specific deposit fee due date.
Due % (due percentage)	Enter the percentage of the deposit that is due. You must define enough rows to total 100 percent.
Update Application from SF (update application from Student Financials)	Select to automatically update the student's academic program status when you post the deposit fee.
Status Update	If you select the Update Application from SF option, you must specify how students' program statuses are updated. Click this link to access the Status Update page.

Defining Status Changes Resulting from Deposits

Access the Status Update page (click the Status Update link on the Deposit Due Dates page).

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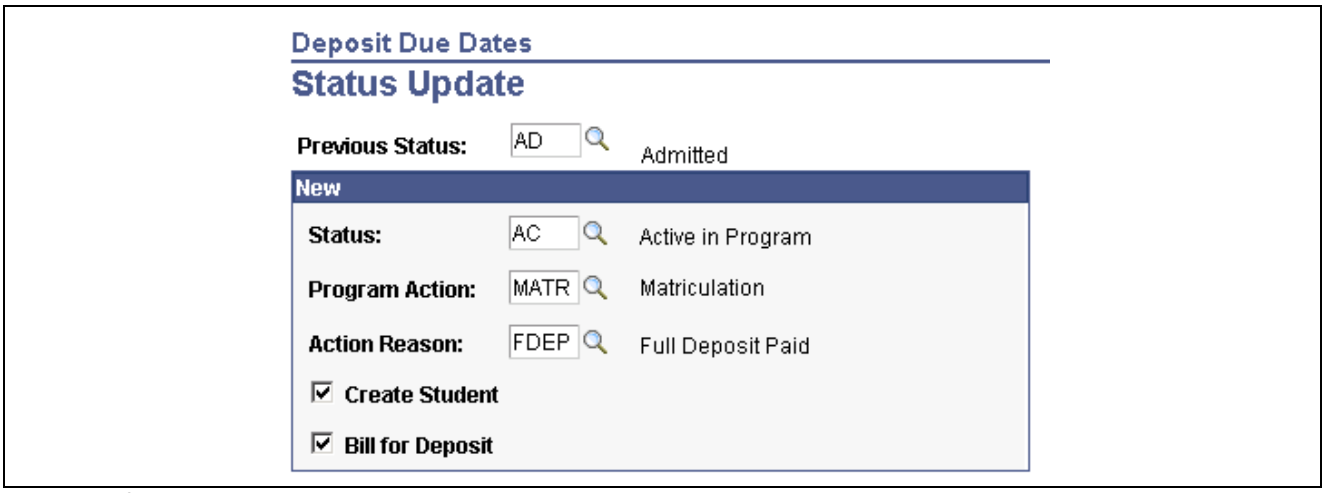

Status Update page

Previous Status Enter the academic program status of the students prior to posting a deposit fee.

New

Status Enter the academic program status that the system assigns to students when it posts their deposit fees.

Program Action Enter the program action that initiates the status change.

Action Reason Enter the reason for the program action that you select.

Create Student Select to automatically matriculate students into an academic program upon receipt of the deposit.

Bill for Deposit Select to generate a bill for any remaining deposit balance.

Setting Up Term Fee Codes

To set up term fee codes, use the Term Fees component (TERM_FEE_PANEL) and the Copy Term Fees component (RUN_SFCPTMFE).

This section provides an overview of term fee codes and discusses how to:

- Define term fee codes.
- Define term and session fees.
- Define term sub fee codes.
- Define term sub fees.
- Define tuition residency minimums and maximums.
- Copy term fees to subsequent terms.

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Understanding Term Fee Codes

Term fee codes are the most generalized method of establishing rates for tuition and fees. Each term fee code comprises one or more term fee definitions. Each term fee definition comprises one or more term sub fee codes. And each term sub fee code comprises one or more term sub fees. This multilevel structure provides flexibility and convenience.

By using different fee triggers and calculation methods at the lower levels, one term fee code can control how tuition is calculated for a wide range of unique student situations. Another term fee code can do the same for room and board combinations. Take the time to learn how term fee codes work and how you can use them to solve your most complex tuition calculation needs.

Term Sub Fee Codes

You can define one or more sub fee codes for a given term fee. Sub fee codes provide flexibility in how you show charges on an account, how you calculate charges, and how you print charges on a bill. For example, if your institution prefers to show just the *bottom line* charge for tuition and fees rather than the detail of these fees, you can use sub fees to define all the fees that compose a tuition and fees charge, and one charge appears on an account. If your institution prefers to show the detail of each charge that composes tuition and fees, you can create individual term fees for each of these charges and break down tuition and fees into detail on an account.

Term Fee Copying

After you define your term fees for one term, you can copy those same fees forward to subsequent terms. This enables you to set term fees at the start of each term; you do not have to redefine your term fee schedule with each new term, which reduces data entry time.

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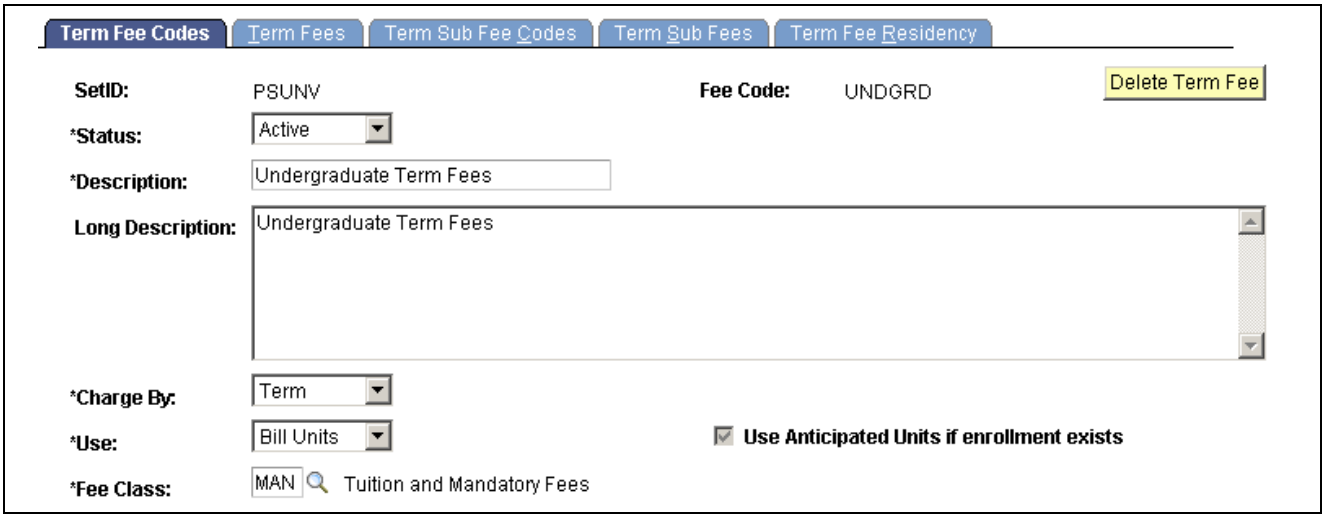
Pages Used to Set Up Term Fee Codes

Page Name	Definition Name	Navigation	Usage
Term Fee Codes	TERM_FEE_CD_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Term Fees, Term Fee Codes	Define term fee codes.
Term Fees	TERM_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Term Fees	Define term and session fees.
Term Sub Fee Codes	TERM_SF_CODE_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Term Fees, Term Sub Fee Codes	Define term sub fee codes.
Term Sub Fees	TERM_SUBFEE_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Term Fees, Term Sub Fees	Define term sub fees.
Term Fee Residency	TERM_FEE_RES_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Term Fees, Term Fee Residency	Define tuition residency minimum and maximum amounts.
Copy Term Fees	RUNCTL_SFCPTMFE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Copy Term Fees	Copy term fees to subsequent terms.

Defining Term Fee Codes

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



Term Fee Codes page

Delete Term Fee Click to delete the term fee.

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The Institution Set, Academic Career, and Term fields must be populated in the user's User Defaults page.

Note. You cannot delete a term fee that is in use by an active tuition group.

Charge By

Bundle 30. Added ITEM_SF installment exception when charging by session or term.

Specify how the fee code calculates fees. Values are:

Class: Select to reflect charges for the particular term fee that is relative to each class in the student's account information. The system automatically makes available the information that is necessary to use course lists with third-party contracts.

Session: Select to sum charges for all classes that are taken within a particular session in the student's account information. If you select this option and want to use course lists with third-party contracts, you must also enable Track Class Pricing (on the Term Fees page).

Note. If you use ITEM_SF installments, you cannot use the track class pricing functionality.

Term: Select to sum charges for all classes that are taken with a particular term in the student's account information. If you select this option and want to use course lists with third-party contracts, you must also enable Track Class Pricing (on the Term Fees page).

Note. If you use ITEM_SF installments, you cannot use the track class pricing functionality.

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

Use

Select the basis for calculating the fee. Values are:

Anti Units (anticipated units): Select to calculate fees based on the number of units in which students typically enroll within a certain academic program. For example, if Fine Arts freshmen are expected to enroll in 15 units, the system calculates the fee on that basis for all freshmen.

Bill Units: Select to charge fees based on the actual number of units in which the student is enrolled versus anticipated units.

Use Anticipated Units if enrollment exists

Select to calculate fees based on anticipated units even if actual enrollment information is available. If you do not select this check box and you are calculating fees using anticipated units, the system uses actual enrollment information when it is available.

Fee Class

Select a fee class to use for reporting purposes.

See Also

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

lssf, Administering Payment Plans, Administering Third-Party Contracts

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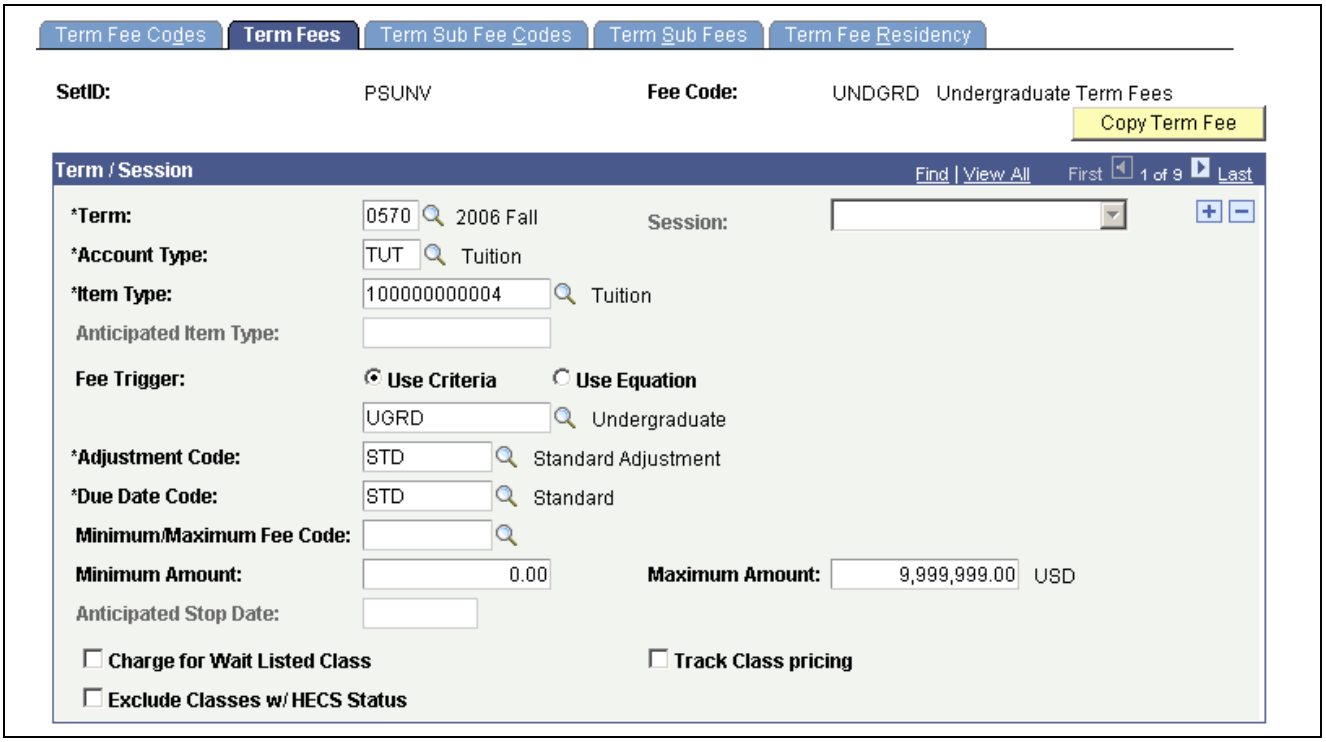
Defining Term and Session Fees

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



Term Fees page

Copy Term Fee Click to copy the term fee to a new term.

Term Select the term to which the term fee applies.

Session If you defined the term fee code to charge by session on the Term Fee Codes page, select the session to which the term fee applies.

Account Type and **Item Type** Select an account type and item type for the term fee.

Anticipated Item Type If the system calculates the term fee code using anticipated units, this field is required. Select a different item type from the one you selected in the Item Type field to distinguish between charges that are based on anticipated enrollment and charges that are based on actual enrollment.

Note. If you set up multiple terms, ensure that you specify an anticipated item type for each term.

Fee Trigger To select an optional fee trigger that limits the application of the term fee to specific students, click either the Use Criteria option or the Use Equation option, and then select the predefined criteria or equation from the lookup.

See lsfn, Working with Equation Engine.

Adjustment Code Enter the adjustment code (calendar) that governs this fee. This code determines the refund amount for students who drop classes.

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Note. This adjustment code is used only for class drops. The adjustment code for withdrawal is attached to the tuition group.

Due Date Code Select a due date code (calendar) to define when the fee is due and payable.

Minimum/Maximum Fee Code Enter an optional minimum/maximum fee code to assign predefined limits to the term fee.

Minimum Amount Enter a minimum charge amount that is unique to this term fee.

Maximum Amount Enter a maximum charge amount that is unique to this term fee.

Anticipated Stop Date This field becomes available when the system calculates fees using anticipated units. Enter a date after which the system no longer uses anticipated units. At this point, the system calculates the term fee using actual enrollment (billing) units. If the student has not enrolled in classes by the date specified, the system calculates fees using zero units. If so defined, minimum charges could still apply.

Charge for Wait Listed Class Select to charge the term fee for students who are on a waiting list for a class.

Track Class Pricing Select to track revenue on a class-specific basis, thereby allocating revenue to specific departments. For example, a student pays a term fee of 2,000.00 USD and is enrolled in four classes of equal units: Physics 150, Calculus 31, Art 111, and Philosophy 101. Breaking down the fee by class yields revenue of 500.00 USD per class. Using revenue tracking by class, you can allocate the revenue from Physics 150 to the Physics Department, the revenue from Calculus 31 to the Math Department, the revenue from Art 111 to the Art Department, and the revenue from Philosophy 101 to the College of Liberal Arts.

Bundle 30. Added ITEM_SF installment exception.

Note. To accurately track revenue by class, you must set up your item types and classes appropriately in addition to selecting this check box. However, if you use ITEM_SF installments, you cannot use the track class pricing functionality.

See lssr, Managing the Schedule of Classes.

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

Exclude Classes w/HECS Status(exclude classes with Higher Education Contribution Scheme status)(AUS) Select this option so that students are not charged twice for the same class if they are under multiple loan programs.

See Also

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Establishing Criteria for Tuition Groups and Fee Triggers

lssf, Setting Up Fees and Tuition Groups, Defining Minimum and Maximum Fees

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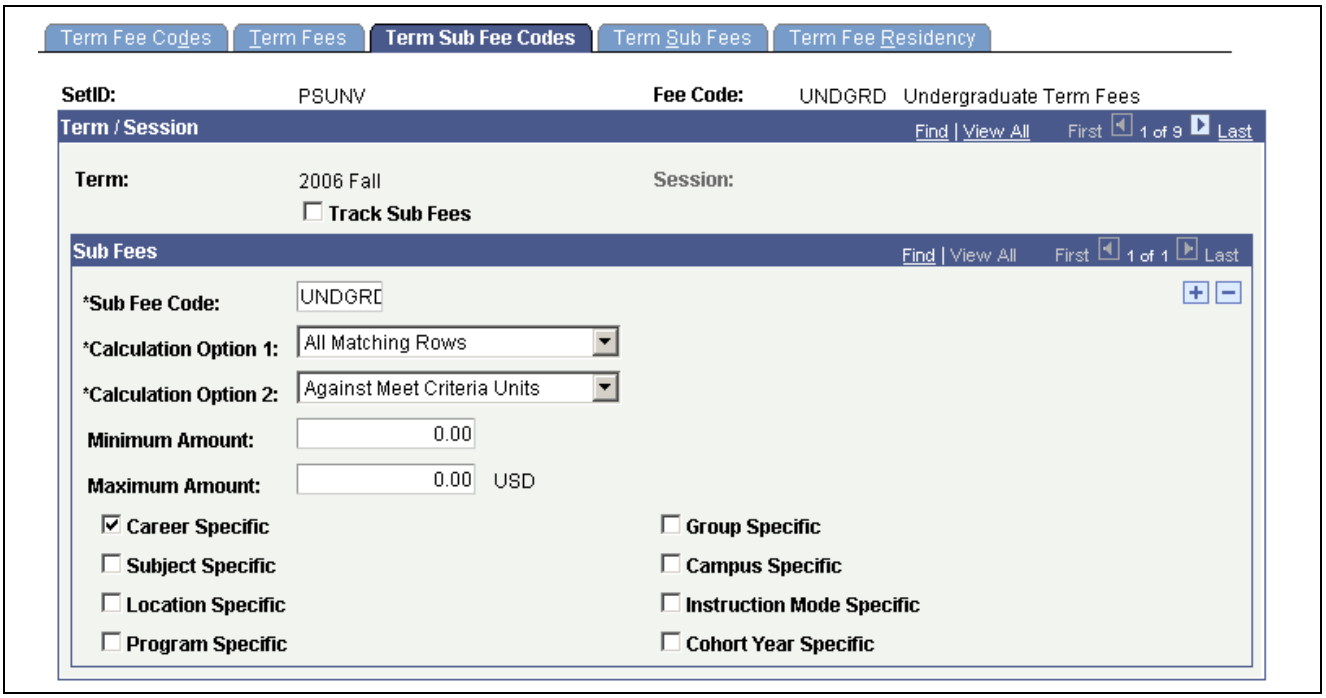
Defining Term Sub Fee Codes

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



Term Sub Fee Codes page

Track Sub Fees Select to break down charges by the individual sub fees within the sub fee code . When the check box is cleared, the system sums all sub fee charges.

Sub Fee Code Enter the sub fee code that you are defining.

Calculation Option 1 and Calculation Option 2

To charge students the maximum fees, set the Calculation Option 1 field to *All Matching Rows* and the Calculation Option 2 field to *Against All Enrollment Units*. To charge students the minimum fees, set the Calculation Option 1 field to *Most Descriptive Row* and the Calculation Option 2 field to *Against Meet Criteria Units.*

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

Calculation Option 1 This option determines who is charged a term sub fee. Values are:

All Matching Rows: The system assesses the term sub fee against all criteria that match the check box selections that you select at the bottom of the page: Career Specific, Group Specific, Subject Specific, Campus Specific, Location Specific, and Instruction Specific. This is the default value.

Most Descriptive Row: The system charges the term sub fee for criteria that most closely match the check box options that you select at the bottom of this page. If you selected the *Most Descriptive Row* value for Calculation Option 1, select the appropriate specific option: Career Specific, Group Specific, Subject Specific, Campus Specific, Location Specific, or Instruction Mode Specific.

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Calculation Option 2 Determines how the system calculates the term sub fee. Values are:

Against All Enrollment Units: The system charges the students (identified in the Calculation Option 1 field) the term sub fee against all the units in their class load. This is the default value.

Against Meet Criteria Units: The system charges the students the term sub fee against only the courses they are taking that match the criteria that was selected in Calculation Option 1.

Minimum Amount Set an optional minimum amount for the term sub fee.

Maximum Amount Set an optional maximum amount for the term sub fee.

Matching Criteria

If you select *Most Descriptive Row for Calc Option 1*, or *Against Meet Criteria Units in Calc Option 2*, or both, you must define the specific criteria that the courses must match. The following check boxes enable you to control the application of term sub fees by specifying class characteristics. For example, you might have a class for which you charge 350.00 USD per unit if it is taught in a classroom by a professor, and 275.00 USD per unit if the class is an independent study using videotaped lectures. By selecting the Instruction Mode Specific check box, you can define two term sub fees under a single sub fee code. For students taking the class with a professor, the system charges 350.00 USD per unit. For students taking the class as an independent study, the system charges 275.00 USD.

Career Specific Select to match classes by academic career.

Group Specific Select to match classes by academic group.

Subject Specific Select to match classes by academic subject area.

Campus Specific Select to match classes by campus.

Location Specific Select to match classes by class location specification.

Instruction Mode Specific Select to match classes by instruction mode.

Program Specific If Program Specific is selected, the Term Sub Fees page allows the user to select the academic program for which this fee is intended.

(AUS) Cohort Year Specific Select to specify the cohort year on the Term Sub Fees page.

Note. The Cohort Year field is available on this page only if the institution has selected the Australia functionality in their academic structure. The value in the Institution field is used to determine whether the Australia functionality was selected in the academic structure (not the setID).

Defining Term Sub Fees

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

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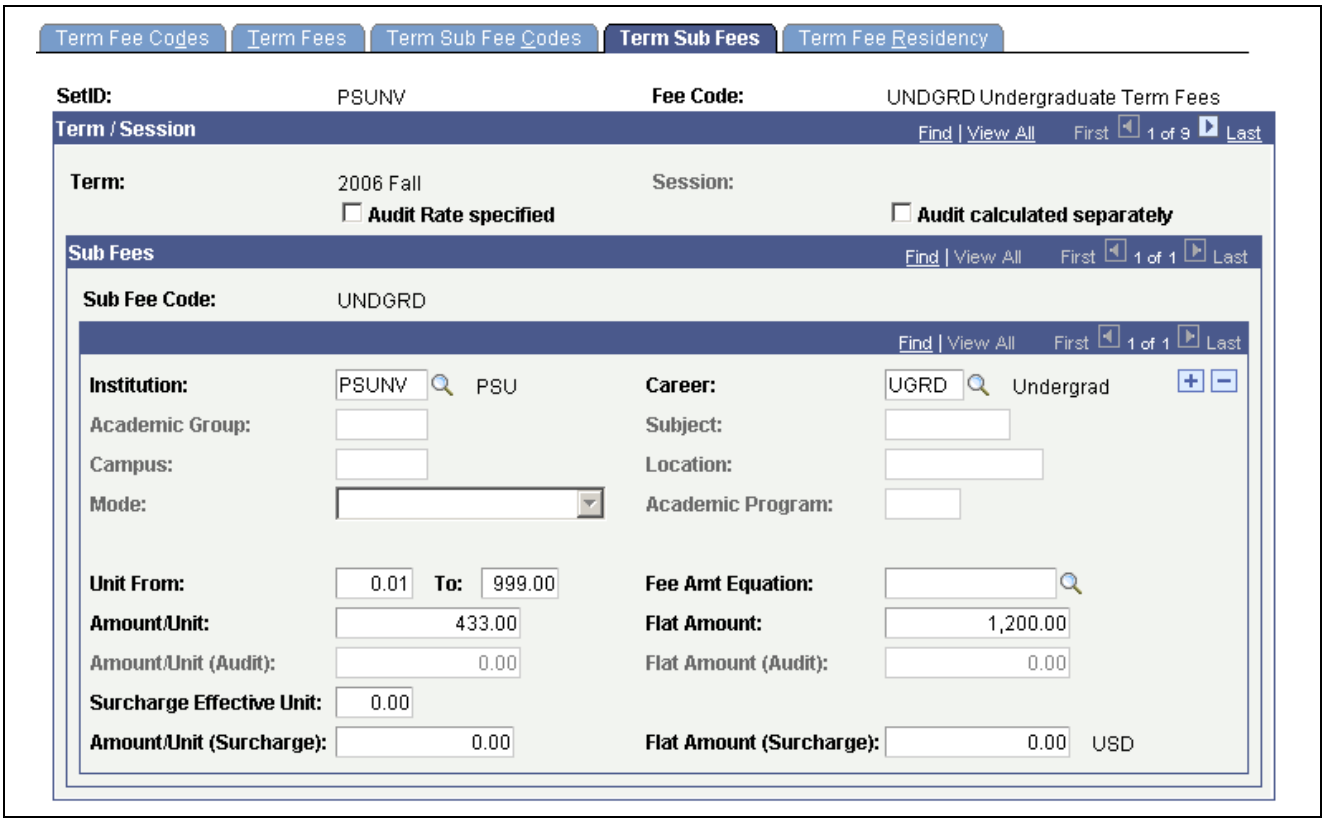

Term Sub Fees page

Audit Rate Specified and Audit Calculated Separately

Two options determine how the system assesses charges for audited classes: Audit Rate Specified and Audit Calculated Separately.

Audit Rate Specified

Select to use a special rate for audited classes. If you select this option, the tuition calculation process uses the audit rate that you have defined. If the check box is cleared, the system applies regular rates to audited classes.

When you select this check box, the Amount/Unit (Audit) and Flat Amount (Audit) fields become available.

Audit Calculated Separately

Select to calculate audited classes separately from graded classes. If you select this check box, the system charges students only the audit rate for the class. If you clear this check box, and you select the Audit Rate Specified check box, the system charges students the audit rate in addition to the regular term fee.

Term Sub Fee Calculation Specifications

Use the following fields to more narrowly target the application of the fee. The fewer fields that you define, the more broadly the system applies the fee. These fields are available only if the corresponding options are selected on the Term Sub Fee Codes page.

Institution

Select the institution that uses the term sub fee.

Career

If you selected the Career Specific check box on the Term Sub Fee Codes page, select an academic career.

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Academic Group If you selected the Group Specific check box on the Term Sub Fee Codes page, select an academic group.

Subject If you selected the Subject Specific check box on the Term Sub Fee Codes page, select an academic subject area.

Campus If you selected the Campus Specific check box on the Term Sub Fee Codes page, select a campus.

Location If you selected the Location Specific check box on the Term Sub Fee Codes page, select a location.

Mode If you selected the Instruction Mode Specific check box on the Term Sub Fee Codes page, select a mode.

Academic Program If you selected the Program Specific check box on the Term Sub Fee Codes page, select an academic program. This is the academic program on the student's enrollment and not the student's primary academic program.

(AUS) Cohort Year If the Cohort Year Specific check box was selected on the Term Sub Fee Codes page, then you can specify the cohort year here.

Note. This field is available on this page only if the institution has selected the Australia functionality in their academic structure. The value in the Institution field is used to determine whether the Australia functionality was selected in the academic structure (not the setID).

Fee Specifications

Using the following fields, you can control exactly how much to charge for the term sub fee. Fees can be based on academic units, a flat fee, a per-unit surcharge, a flat fee surcharge, or a combination of all four. The amounts that you enter are not independent of each other. Rather, they are summed. For example, if you establish an amount per unit of 250 USD and a flat amount of 300 USD, the system charges a student taking 15 units 4,050 USD (3,750 + 300 USD). If you specify an audit rate, the system also adds fees for audited to the total.

Unit From and **To** Use the Unit From and To fields to define the range of units that are eligible for the term sub fee. The system does not charge the term sub fee for the number of units less than the number in the Units From field and greater than the number in the To field. Make sure that you set the range to cover all possibilities.

Note. If the unit from value is set to zero, the system can calculate fees for students who are active in a term but not enrolled for classes. To prevent an incorrect calculation, set the unit from amount no lower than *0.10*.

Fee Amt Equation (fee amount equation) Enter an optional equation that you have defined to calculate fees. Equations are an alternative method of calculating fees. If your fee structure is very complex, equations might be more efficient, because they can reduce term fee maintenance.

Amount/Unit Enter the amount to charge per unit.

Flat Amount Enter a flat amount to charge, regardless of the units taken.

Amount/Unit (Audit) Enter the amount to charge per unit for audited classes.

Flat Amount (Audit) Enter a flat amount to charge for audited classes, regardless of units taken.

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Surcharge Effective Unit To include a surcharge when students enroll for more than a specified number of academic units, enter the threshold number in this field. For example, to apply a surcharge to students who are enrolled in more than 15 units, enter *15*.

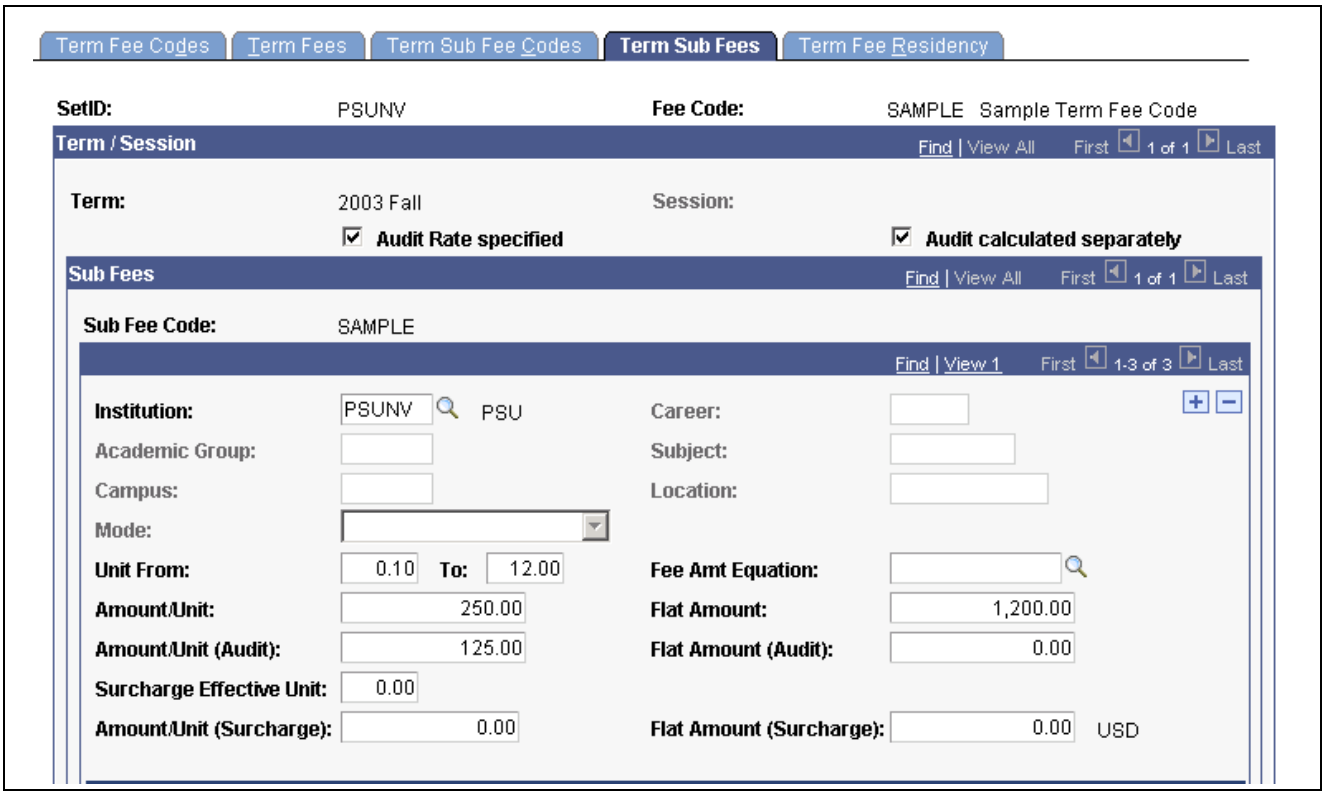
Amount/Unit (Surcharge) (amount per unit surcharge) Enter a per unit surcharge for overload units.

Flat Amount (Surcharge) Enter a flat amount charge for overload units.

Setting Up a Multitiered Tuition Term Sub Fee

Setting up a multitiered tuition fee schedule is easy using additional term sub fee definitions. In the following example, three term sub fees are defined to charge tuition for three different ranges of academic units:

- Students who take up to 12 units are charged a flat amount of 1,200 USD, plus 250 USD per unit (12 units = 4,200 USD).
- Students who take up to 15 units are charged a flat amount of 1,200 USD, plus 250 USD for the first 12 units, plus 225 USD per unit for the additional units (15 units = 4,875 USD).
- Students who take over 15 units are charged a flat amount of 1,200 USD plus 250 USD per unit for the first 12 units, plus 225 USD per unit for the next 3 units, plus 200 USD for each unit over 15.



Term Sub Fees page (1 of 2)

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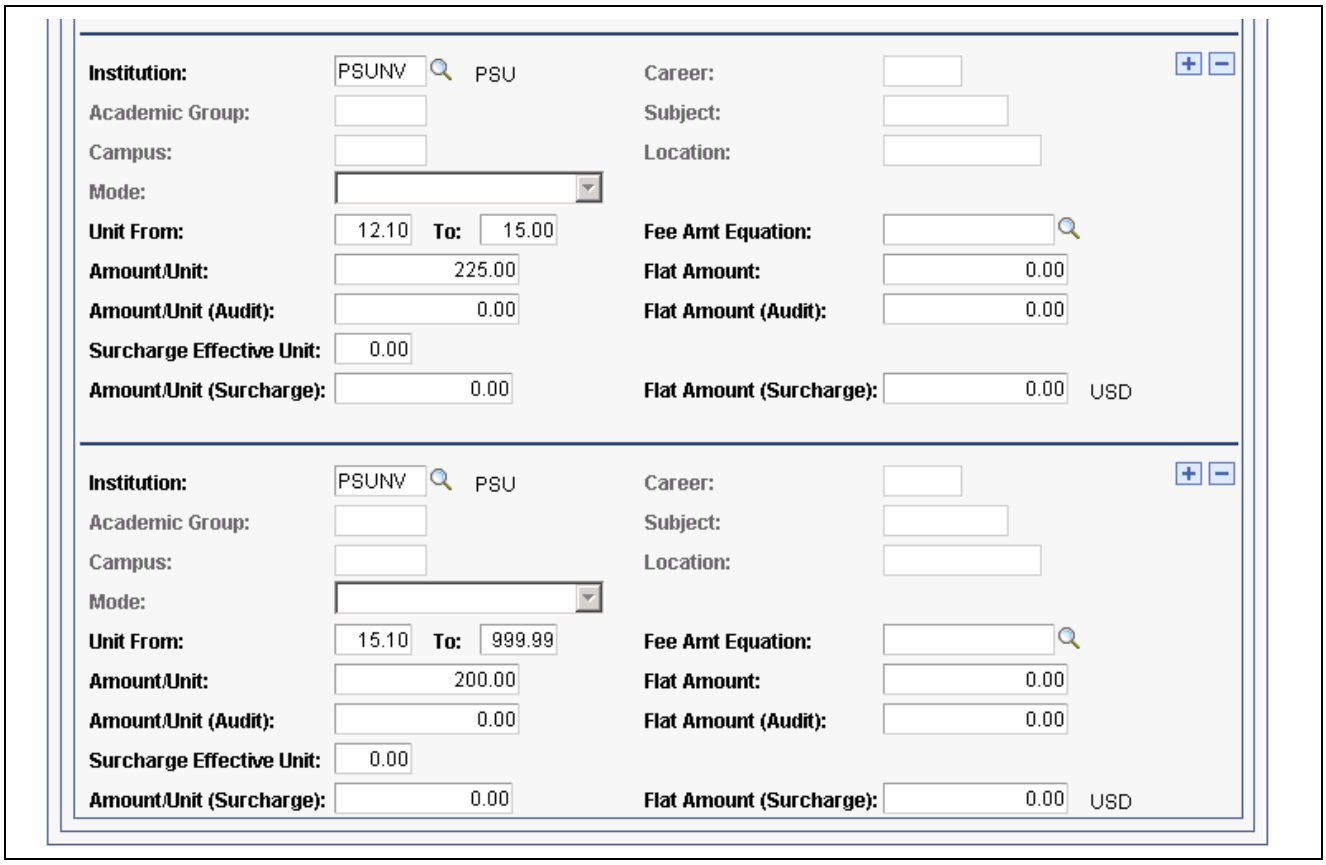
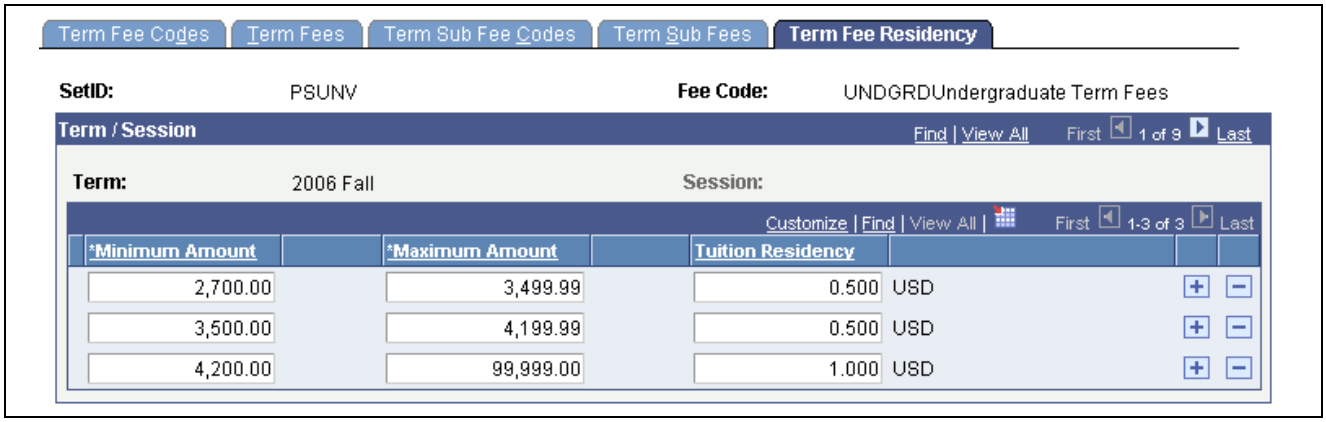


Term Sub Fees page (2 of 2)

Defining Tuition Residency Minimums and Maximums

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



Term Fee Residency page

Minimum Amount and **Maximum Amount**

Enter the minimum and maximum amounts that a student pays to reach each level of tuition residency.

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Tuition Residency

If your institution has programs in which students do not have to pay for more than a specified number of terms at full-time equivalency rates, you can use tuition residency to automatically cap the fees. For example, you might offer a professional education program that can be completed with seven terms of full-time work. To attract students, you advertise a seven-term course of study for a specified amount of money. Enrolling students are placed in cohort groups, attend a structured series of classes, and pay a flat amount per term. Over the course of seven terms, some students inevitably will have scheduling conflicts with one or more classes and they will have to take them out of sequence. To accommodate these students, you allow them to take the classes the next time that they are offered at no additional charge. By using tuition residency functionality, you can automatically ensure that the students pay the full tuition and that the system does not accidentally charge them for the delayed classes.

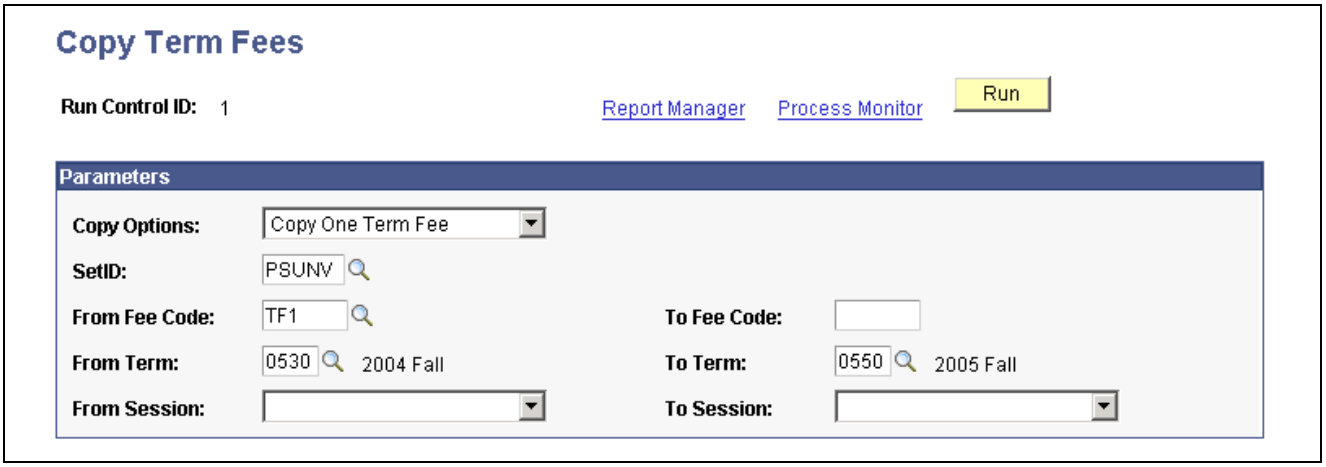
See Also

lssf, Setting Up Fees and Tuition Groups, Defining Minimum and Maximum Fees

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

Copying Term Fees to Subsequent Terms

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



Copy Term Fees page

Copy Options Select the copy options that you want to use:

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

Copy All Term Fees: Copies all the term fees in the source term to the target term.

Copy One Term Fee: Enables you to copy a specific fee from one term to another or to rename a term fee definition within the same term. When you select this option, the From Fee Code and To Fee Code fields become available for use.

SetID Select the setID to which the term fees are linked.

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From Fee Code	Select the source fee code from the required From Fee Code field.
To Fee Code	Enter the name of the fee code in the To Fee Code field. To copy the fee code to a new term, you can use the same name. To rename the fee code definition, enter the new name.
From Term and **To Term**	Select the source term in the From Term field. Select the target term in the To Term field.
From Session and **To Session**	Use the From Session field to identify any session that is held in the source term whose fee schedule you are copying. Use the To Session field to identify any session target term for which you want to use the copied fee schedule.

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

Setting Up Course Fees and Class Fees

To set up course fees and class fees, use the Rate Tables for Course Fees component (CRSE_RATE_PANEL), the Course Fees component (CRSE_FEE_PANEL), the Course Fees Modal component (CRSE_FEE_MODAL), the Class Fees component (CLASS_FEE_PANEL), and the Class / Course Fees Rollover component (RUNCTL_FEE_RLVR).

This section provides an overview of course and class fees, and discusses how to:

- Set up rate tables for course fees.
- Define course fees.
- Define course sub fees.
- Define modal course fees.
- Define modal course sub fees.
- Define class fees.
- Define class sub fees.
- Define modal class fees.
- Define modal class sub fees.
- Roll over course and class fees to future terms.

Understanding Course Fees and Class Fees

After term fees, course fees and class fees are the most generalized method of establishing rates for fees.

Rate Tables for Course Fees

Use course rate IDs to add student characteristics to a course fee. Using a course rate ID with a course fee enables you to charge students with different characteristics at different rates. For example, you could charge an undergraduate chemistry student one fee for a lab, and an undergraduate humanities student a different fee for the same lab.

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Note. Course rate IDs are not a replacement for course fees. Rather, they work in conjunction with a course fee definition.

Course Fees

Course fees provide additional flexibility in assessing fees. For example, you can define extra fees for courses with labs or studio sections. You could also override the term fees calculation rules for a particular course and charge a different fee altogether.

Note. If only one instance of the course exists, the course fee acts as the class fee. However, if a difference exists between a course fee and a class fee, the class fee overrides the course fee.

Class Fees

A class is a particular instance of a course. Courses are identified at the catalog level, and classes are identified through the class schedule. If the course fee is different from the fee charged for a class offered in that course, the class fee overrides the course fee.

Modal Course Fees and Class Fees

The Course Fees Modal component enables student records personnel to define course fees when accessing the Course Catalog component within PeopleSoft Student Records.

The Class Fees Modal component enables student records personnel to define class fees when accessing the Schedule New Course or Schedule of Classes components within PeopleSoft Student Records.

See Also

lssr, Setting Up the Course Catalog, Creating Course Offerings

lssr, Managing the Schedule of Classes

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Pages Used to Set Up Course Fees and Class Fees

Page Name	Definition Name	Navigation	Usage
Rate Tables for Course Fees	CRSE_RATE_TABLE	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Rate Tables for Course Fees	Set up rate tables for course fees.
Course Fees	CRSE_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Fees	Define course fees.
Course Sub Fees	CRSE_SUBFEE_TABLE	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Sub Fees	Define course sub fees.
Course Fees Modal	CRSE_FEE_TBL_MDL	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Fees Modal	Define modal course fees.
Course Sub Fees Modal	CRSE_SUBFEE_TBL_MD	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Sub Fees Modal	Define modal course sub fees.
Class Fees	CLASS_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class Fees	Define class fees.
Class Sub Fees	CLASS_SUBFEE_TABLE	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class Sub Fees	Define class sub fees.
Class Fees Modal	CLASS_FEE_TBL_MDL	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class Fees Modal	Define modal class fees.
Class Sub Fees Modal	CLASS_SUBFEE_MDL	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class Sub Fees Modal	Define modal class sub fees.
Class / Course Fees Rollover	RUNCTL_FEE_RLVR	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class / Course Fees Rollover	Roll over course and class fees to future terms.

Setting Up Rate Tables for Course Fees

Access the Rate Tables for Course Fees page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Rate Tables for Course Fees).

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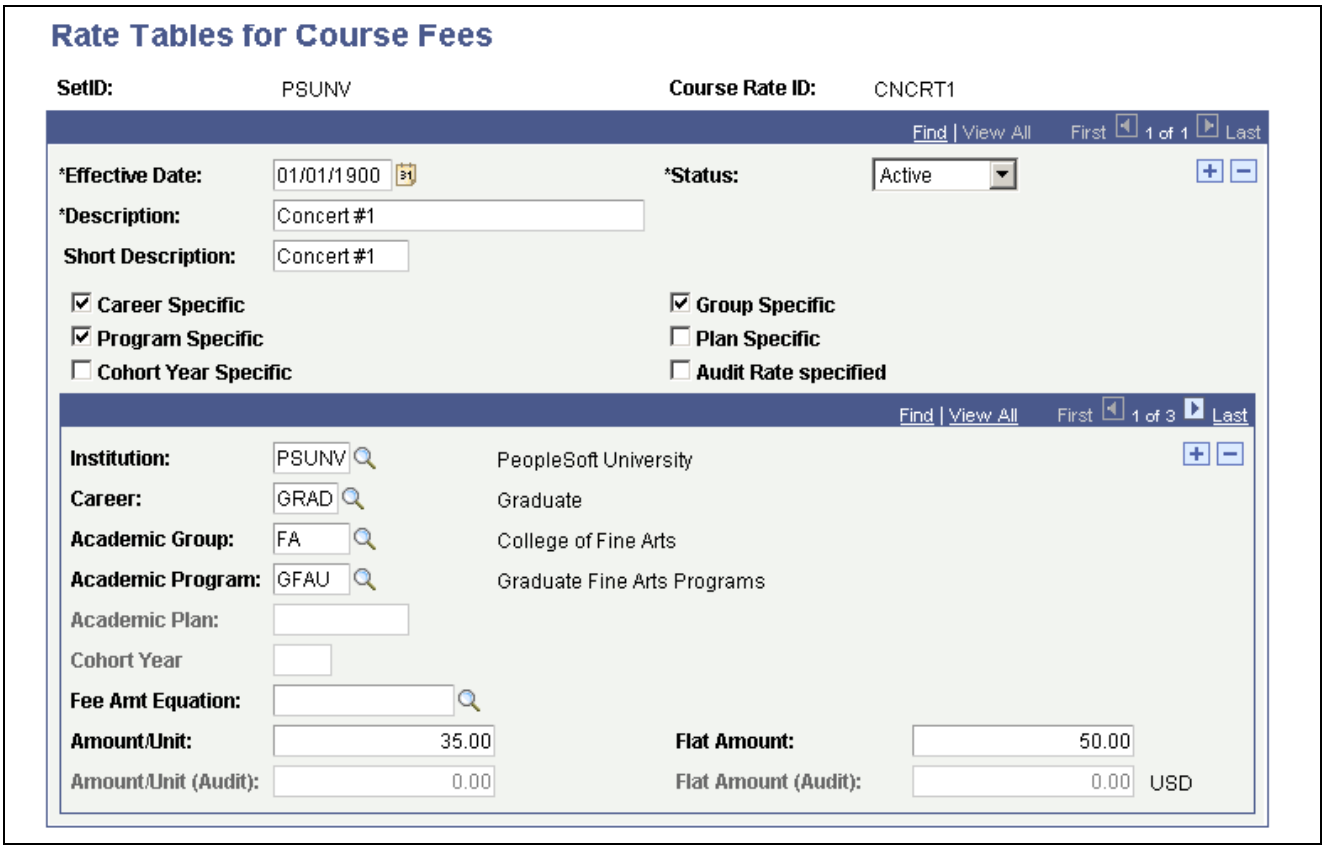

Rate Tables for Course Fees page

Career Specific	Select to match classes by academic career.
Group Specific	Select this option to match classes by academic group.
Program Specific	Select to match classes by academic program.
Plan Specific	Select to match classes by academic plan.
(AUS) Cohort Year Specific	Select to match classes by cohort year.
Audit Rate Specified	Select to define a unique rate for audited courses. If this check box is cleared, students auditing the course are charged the regular rate.
Institution	Enter the academic institution.

Student Characteristics

The following fields describe characteristics of the student, not the course. By inserting additional rows with different combinations of characteristics, you can charge a different rate for the same course. These fields are all optional. To have the fee apply to all students within an institution, leave all of the student characteristics fields blank.

Institution	Select the institution that uses the term sub fee.
Career	If you selected the Career Specific check box, select an academic career.
Academic Group	If you selected the Group Specific check box, select an academic group.

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Academic Program If you selected the Program Specific check box, select an academic program. This is the academic program on the student's enrollment and not the student's primary academic program.

Cohort Year If the Cohort Year Specific check box was selected, then you can specify the cohort year here.

Academic Plan Enter the academic plan to which you want the fee to apply.

Fee Calculation Parameters

Using the following fields, you can control how much the system charges for the course fee. Fees can be charged based on academic units, a flat fee, or a combination of the two. Amounts that you enter are not independent of each other. Rather, they are summed.

Fee Amt Equation Select an optional equation. Equations can be used for more complex selections than is possible using the student characteristics.

Amount/Unit Enter the amount to charge per unit.

Flat Amount Enter a flat amount to charge regardless of units taken.

Amount/Unit (Audit) Enter the amount to charge per unit for audited classes.

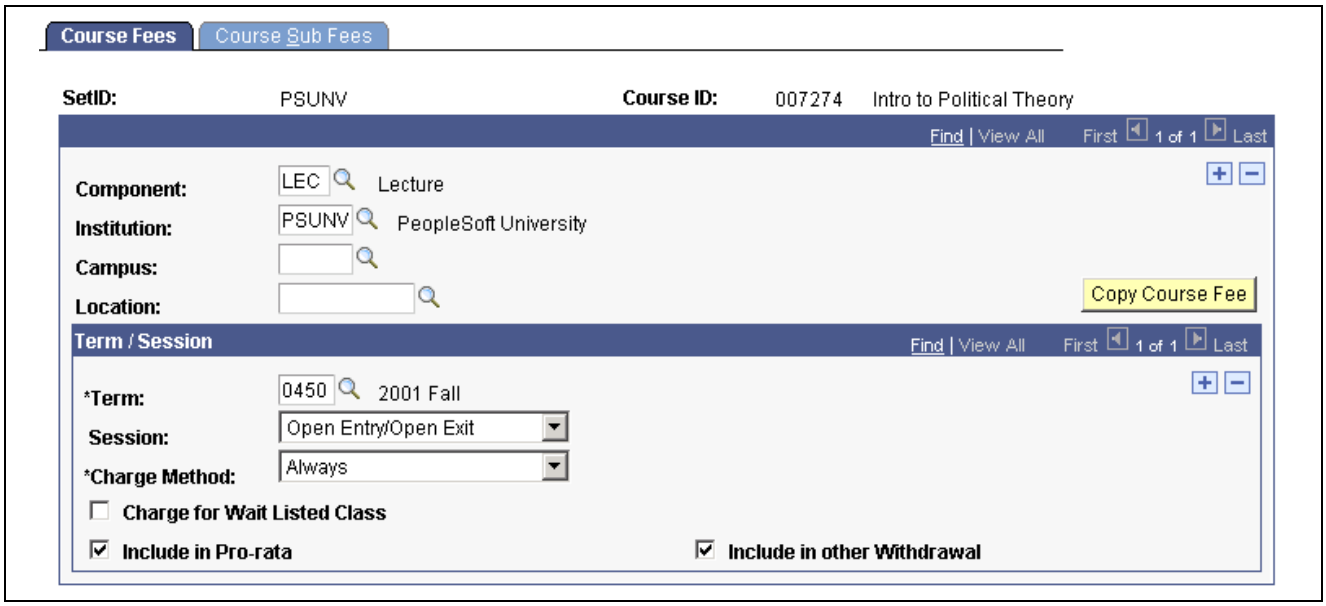
Flat Amount (Audit) Enter a flat amount to charge for audited classes regardless of units taken.

See Also

lsfn, Working with Equation Engine

Defining Course Fees

Access the Course Fees page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Fees, Course Sub Fees).



Course Fees page

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Component	If more than one component of the course exists, select the component for which you want to define the fee. Otherwise, leave this field blank.
Institution	Enter the institution to which the course belongs. If the fee is assessed regardless of the institution, leave this field blank.
Campus	Enter the campus to which the course belongs. If the fee is assessed regardless of the campus, leave this field blank.
Location	Enter the location to which the course belongs. If the fee is assessed regardless of the location, you can leave this field blank.
Copy Course Fee	Select this option to copy a definition from one term to another.

Term/Session

Term	Select the term in which the fee is charged.
Session	If applicable, select the session in which the fee is charged.
Charge Method	Define the charge method. Values are: *Always:* If you select this value, the fee is charged in addition to term fees. For example, the lab fee would be charged in addition to the course's term fee (tuition). *Not included in term tuition:* If you select this value, the course fee is charged in addition to term fees. However, class units will be excluded from the term fee calculation.
Charge for Wait Listed Class	Select this option if the course fee is to be charged to a wait listed student.
Include in Pro-rata	Select this option if this course fee is included in pro rata refund calculations.
Include in Other Withdrawal	Select this option to include this fee in other withdrawal calculations. This selection is optional.

Defining Course Sub Fees

Access the Course Sub Fees page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Sub Fees).

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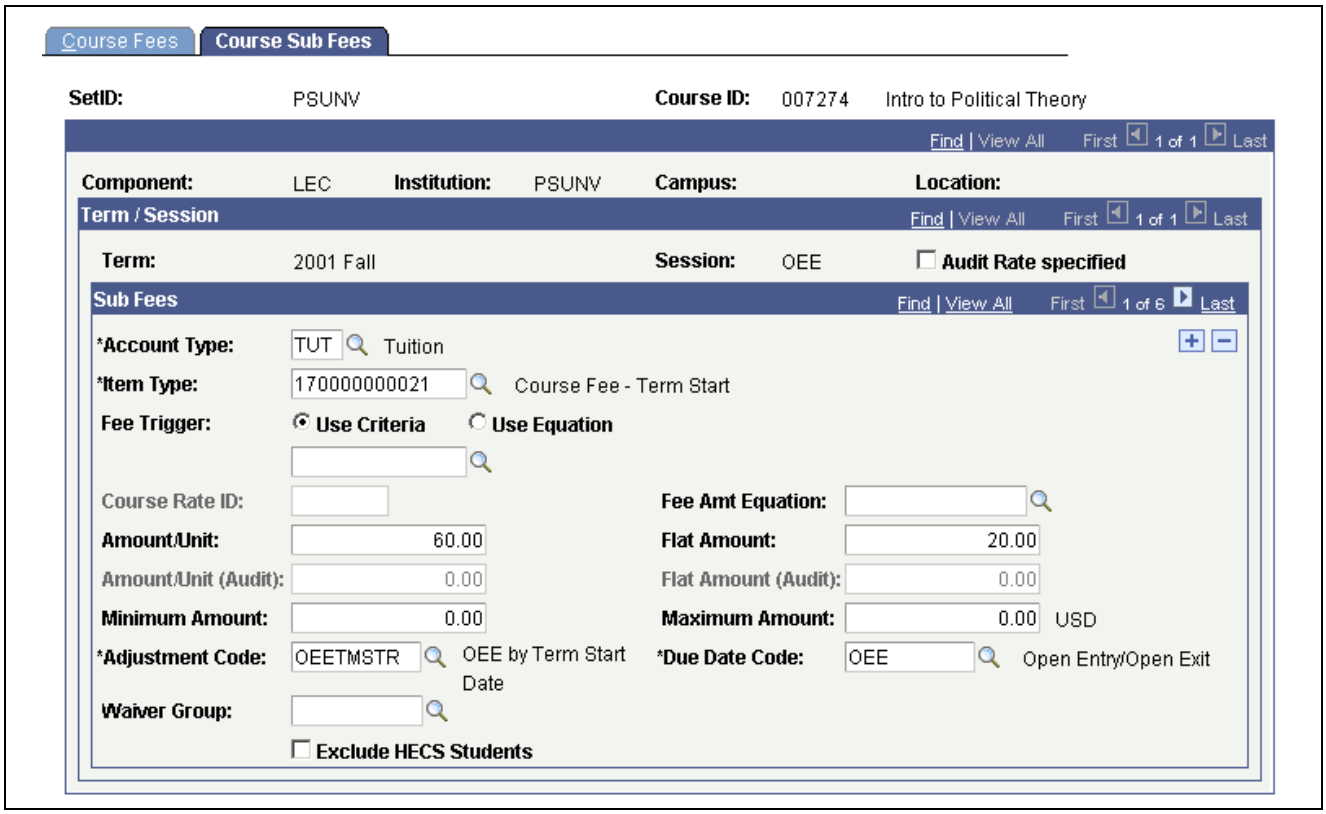

Course Sub Fees page

Audit Rate Specified Select to define a unique rate for audited courses. If you clear this check box, students that audit the course are charged the regular rate.

Account Type Select the account type to which you want to post the course fee.

Item Type Select the item type to which you want the course fee posted.

Fee Trigger To apply the course fee to certain students only, select either the Use Criteria option or the Use Equation option, and then select the predefined criteria or equation from the lookup. If you leave this field blank, all students who take the course are charged the fee.

See lsfn, Working with Equation Engine.

Course Rate ID Enter an optional course rate ID to control the application of the course fee using student characteristics. If you enter a course rate ID, the Equation, Amount/Unit, and Flat Amount fields become unavailable.

Fee Calculation Parameters

Using the following fields, you can control how much the system charges for the course fee. Fees can be charged based on academic units, a flat fee, or a combination of the two. Amounts that you enter are not independent of each other. Rather, they are summed.

Fee Amt Equation (fee amount equation) Select an optional equation. Use equations for more complex selections than are possible using the student characteristics.

Amount/Unit Enter the amount to charge per unit.

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Flat Amount	Enter a flat amount to charge regardless of units taken.
Amount/Unit (Audit)	Enter the amount to charge per unit for audited classes.
Flat Amount (Audit)	Enter a flat amount to charge for audited classes regardless of units taken.
Minimum Amount	Enter an optional minimum amount for the course sub fee.
Maximum Amount	Enter an optional maximum amount for the course sub fee.
Adjustment Code	Select the adjustment code (calendar) to associate with this course sub fee.
Due Date Code	Select the due date code (calendar) to associate with this course sub fee.
Waiver Group	Select an optional waiver group that can offset course sub fee charges.
Exclude HECS Students exclude Higher Education Contribution Scheme students)(AUS)	Select this option so that students are not charged twice for the same class if they are under multiple loan programs.

See Also

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Establishing Criteria for Tuition Groups and Fee Triggers

lsfn, Working with Equation Engine

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Setting Up Adjustment Calendars

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Creating Billing and Due Date Calendars

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Defining Waivers and Waiver Groups

Defining Modal Course Fees

Access the Course Fee Modal page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Fees Modal).

This page is identical to the Course Fees page.

See Also

lssf, Setting Up Fees and Tuition Groups, Setting Up Course Fees and Class Fees, Defining Course Fees

Defining Modal Course Sub Fees

Access the Course Sub Fees Modal page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Sub Fees Modal).

This page is identical to the Course Sub Fees page.

See Also

lssf, Setting Up Fees and Tuition Groups, Setting Up Course Fees and Class Fees, Defining Course Sub Fees

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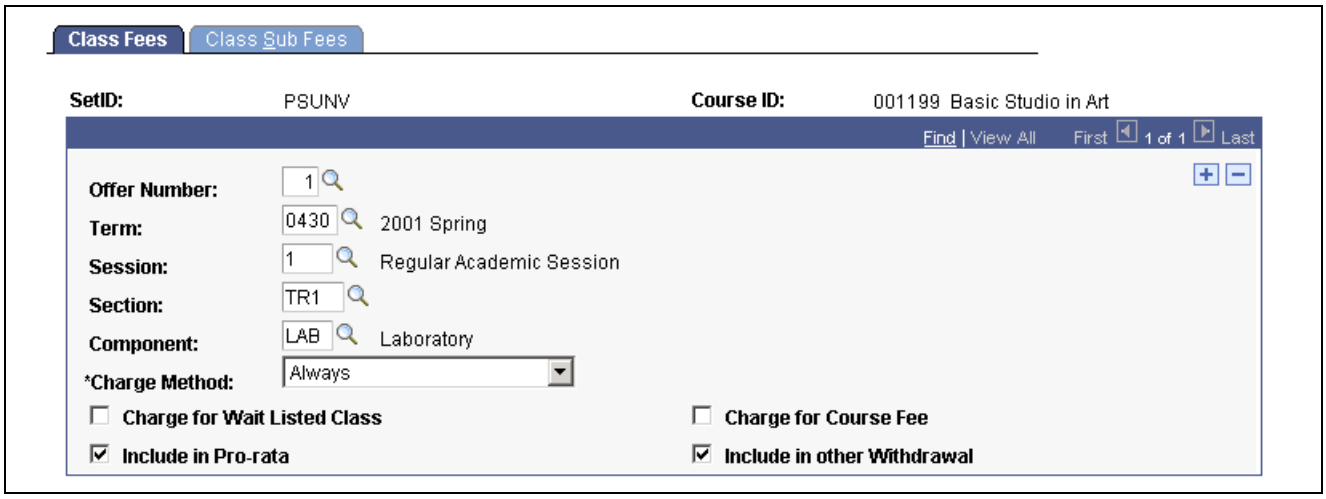
Defining Class Fees

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



Class Fees page

Offer Number	Enter the offer number of the class.
Term	Enter the term for which the class is offered.
Session	If the class is offered in more than one session in the term, enter the session number.
Section	If the class is offered in more than one section, enter a section number.
Component	If more than one component is offered for the class, and the class charge should apply to a specific component, select the component.
Charge Method	Define the charge method. Values are: *Always:* The fee is charged in addition to term fees. For example, the lab fee would be charged in addition to the class term fee (tuition). *Not included in term tuition:* The class is excluded from the term fee calculation and the class fee becomes the total charge for the class.
Charge for Wait Listed Class	Select this option if the class fee is to be charged to a wait listed student.
Charge for Course Fee	Select this option if you want to charge course fees in addition to class fees. If you do not select this check box, class fee definitions override course fee definitions for the same class.
Include in Pro-rata	Select this option if this class fee is included in pro rata refund calculations.
Include in other Withdrawal	Select this option to include this fee in other withdrawal calculations. This selection is optional.

Defining Class Sub Fees

Access the Class Sub Fees page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class Sub Fees).

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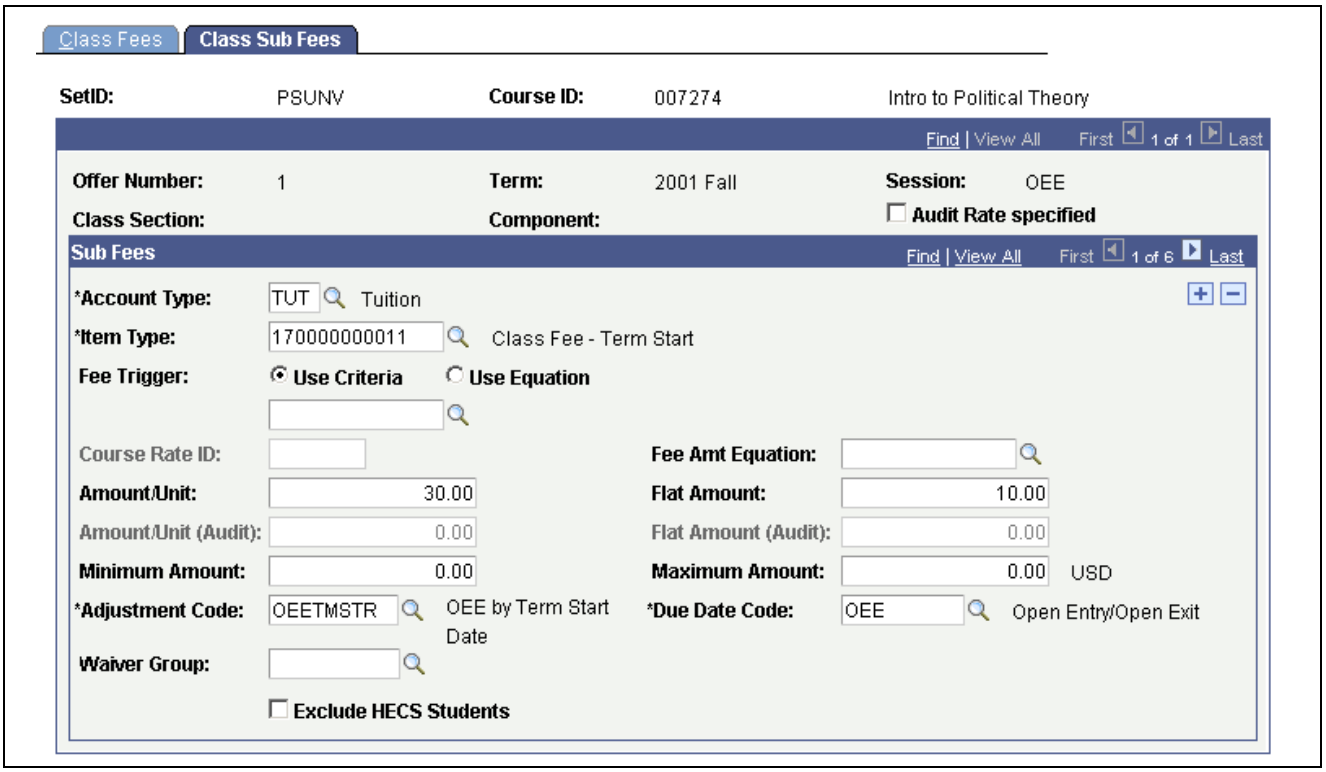

Class Sub Fees page

Audit Rate Specified Select to define a unique rate for audited classes. If the check box is cleared, students auditing the class are charged the regular rate.

Account Type Select the account type to which you want the class fee posted.

Item Type Select the item type to which you want the class fee posted.

Fee Trigger To apply the class fee to specific students, select either the Use Criteria option or the Use Equation option, and then select the predefined criteria or equation from the lookup. If you leave the field blank, the system charges the fee to all students who take the class.

See lsfn, Working with Equation Engine.

Course Rate ID Enter an optional course rate ID to control the application of the class fee using student characteristics. If you enter a course rate ID, the Equation, Amount/Unit, and Flat Amount fields become unavailable.

Fee Calculation Parameters

Using the following fields, you can control exactly how much the system charges for the class fee. Fees can be charged based on academic units, a flat fee, or a combination of the two. Amounts that you enter are not independent of each other. Rather, they are summed.

Fee Amt Equation Select an optional equation. You can use equations for more complex selections than are possible using the student characteristics.

Amount/Unit Enter the amount that you want to charge per unit.

Flat Amount Enter a flat amount that you want to charge, regardless of units taken.

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Amount/Unit (Audit)	Enter the amount that you want to charge per unit for audited classes.
Flat Amount (Audit)	Enter a flat amount that you want to charge for audited classes regardless of units taken.
Minimum Amount	Enter an optional minimum amount for the class sub fee.
Maximum Amount	Enter an optional maximum amount for the class sub fee.
Adjustment Code	Select the adjustment code (calendar) to associate with this class sub fee.
Due Date Code	Select the due date code (calendar) to associate with this class sub fee.
Waiver Group	Select an optional waiver group that can offset class sub fee charges.
Exclude HECS Students (exclude Higher Education Contribution Scheme students)(AUS)	Select this option so that students are not charged twice for the same class if they are under multiple loan programs.

See Also

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Establishing Criteria for Tuition Groups and Fee Triggers

lsfn, Working with Equation Engine

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Setting Up Adjustment Calendars

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Creating Billing and Due Date Calendars

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Defining Waivers and Waiver Groups

Defining Modal Class Fees

Access the Class Fees Modal page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class Fees Modal).

This page is identical to the Class Fees page.

See Also

lssf, Setting Up Fees and Tuition Groups, Setting Up Course Fees and Class Fees, Defining Class Fees

Defining Modal Class Sub Fees

Access the Class Sub Fees Modal page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class Sub Fees Modal).

This page is identical to the Class Sub Fees page.

See Also

lssf, Setting Up Fees and Tuition Groups, Setting Up Course Fees and Class Fees, Defining Class Sub Fees

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Rolling Over Course and Class Fees to Future Terms

Access the Class / Course Fees Rollover page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Class / Course Fees Rollover).

Class / Course Fees Rollover page

From Term and **To Term**	Enter the term from which you are copying fee information and the term to which you are copying it.
Override Existing Setup	If the term that you specify in the To Term field has existing fee information, the process does not overwrite it unless you select this check box. If you select this check box, the process replaces the existing fee information with the fee information from the term specified in the From Term field.
Class Fees, Course Fees, and **Course List Fees**	Select the types of fee information that you want to roll over.

Note. Reversing this process is not possible after you run it.

Defining Optional Fees

To set up optional fees, use the Optional Fees component (OPT_FEE_TABLE).

Your institution may have several fees that apply to many, but not all, students. For example, many students might need to purchase a parking sticker. By setting up a parking sticker fee as an optional fee, students can choose to purchase a parking sticker at the time of registration.

Institutions can use Self Service Miscellaneous Purchases to allow students to select in self service.

For setup information:

See lsss, Setting Up Student Financials Self Service, Setting Up Miscellaneous Fees.

This section discusses how to:

- Define optional fee codes.
- Define optional fee values.
- Link optional fees to terms.

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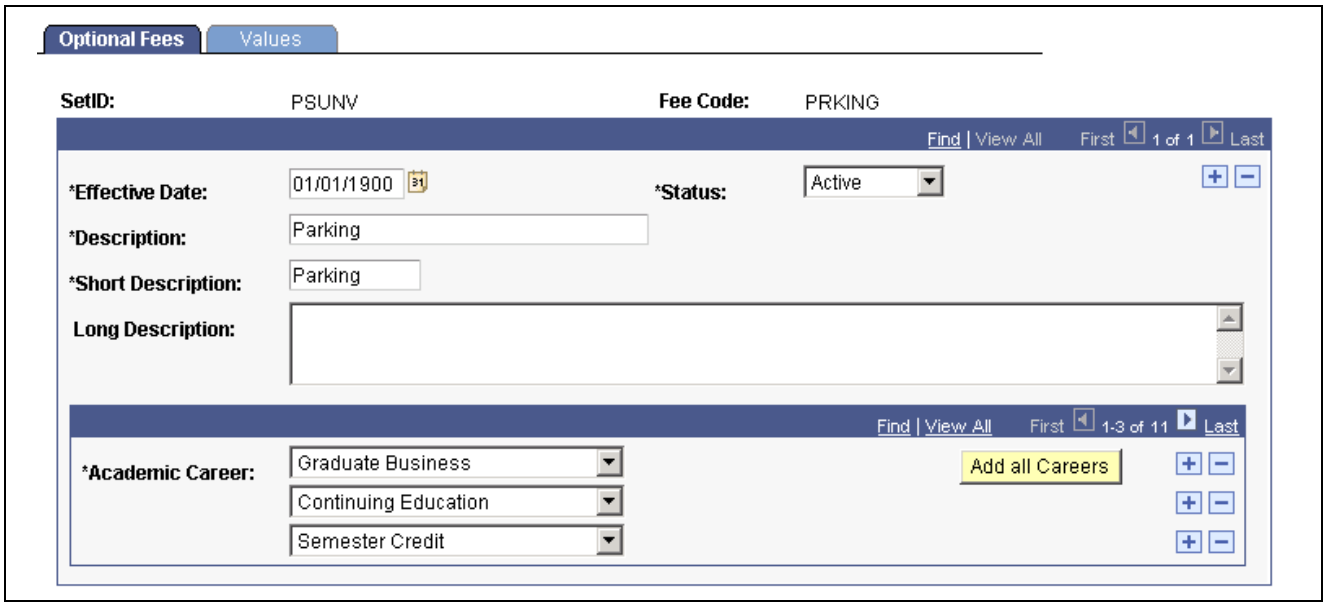
- Define optional fee amounts.

Pages Used to Define Optional Fees

Page Name	Definition Name	Navigation	Usage
Optional Fees	OPT_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Optional Fees, Optional Fees	Define optional fee codes.
Values	OPT_FEE_VAL	Set Up SACR, Product Related, Student Financials, Optional Fees, Optional Fees, Values	Define optional fee values.
Optional Fees - Term	OPT_FEE_TERM	Set Up SACR, Product Related, Student Financials, Optional Fees, Optional Fees - Terms	Link optional fees to terms.
Optional Fees per Term	OPT_FEE_TERM_VAL	Set Up SACR, Product Related, Student Financials, Optional Fees, Optional Fees per Term	Define optional fee amounts.

Defining Optional Fee Codes

Access the Optional Fees page (Set Up SACR, Product Related, Student Financials, Optional Fees, Optional Fees).



Optional Fees page

Add all Careers Click to apply the optional fee to all active academic careers in the institution. If you add all careers, the Academic Career field becomes unavailable.

Academic Career Enter the specific careers to which the system applies the optional fee.

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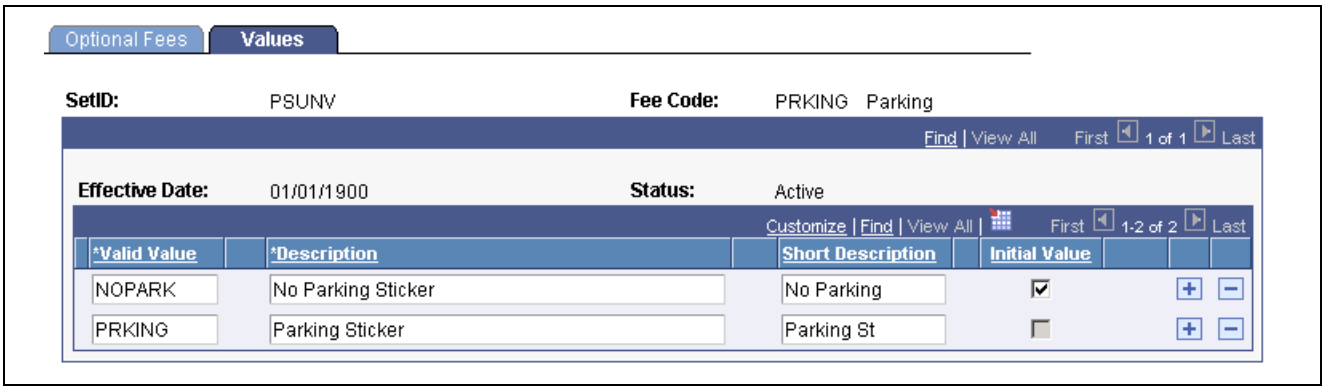
Defining Optional Fee Values

Access the Values page (Set Up SACR, Product Related, Student Financials, Optional Fees, Optional Fees, Values).



Values page

Valid Value Define the valid value for the optional fee. This is the value that is attached to an optional fee per term definition.

Description Provide a description for the optional fee.

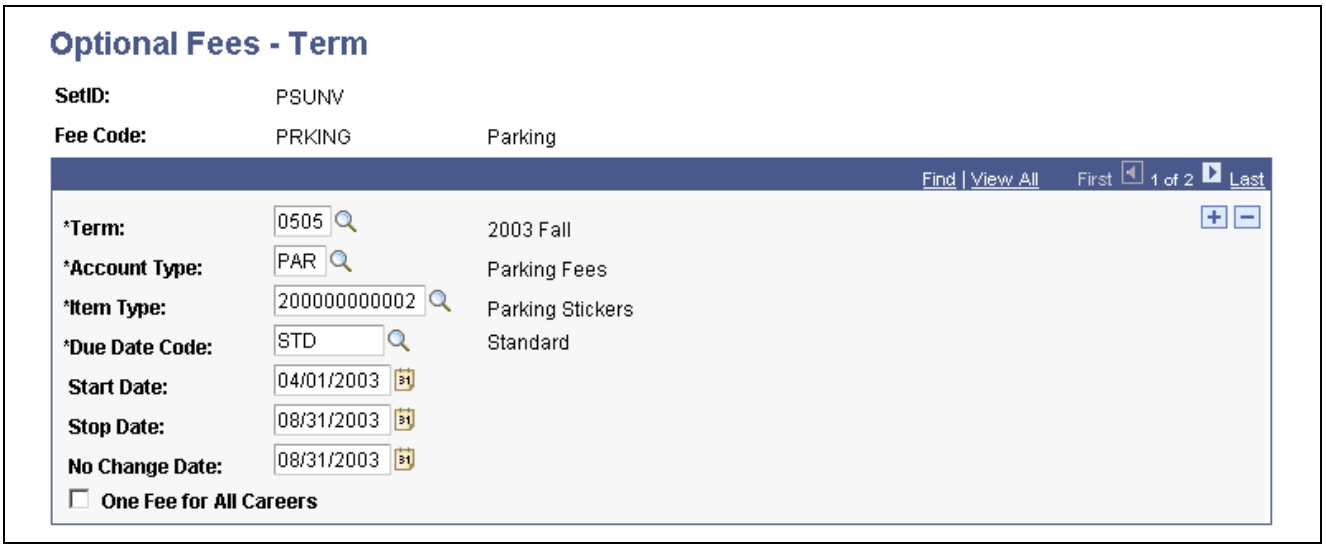
Short Desc (short description) Provide a short description for the optional fee.

Initial Value Select to make a valid value the default value.

Select the Init Value (initial value) check box as the default fee to be charged. In this example, the default value *NOPARK* means that the system does not charge an optional parking sticker fee to a student unless *PRKING* is manually selected during tuition calculation.

Linking Optional Fees to Terms

Access the Optional Fees - Term page (Set Up SACR, Product Related, Student Financials, Optional Fees, Optional Fees - Terms).



Optional Fees - Term page

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Term Select the term in which the fee is charged.

Account Type Enter the account type for the fee.

Item Type Select the item type to which the system posts the optional term fee.

Due Date Code Select the due date code (billing and due calendar).

Start Date Enter an optional start date to specify the first day that the optional fee can be selected.

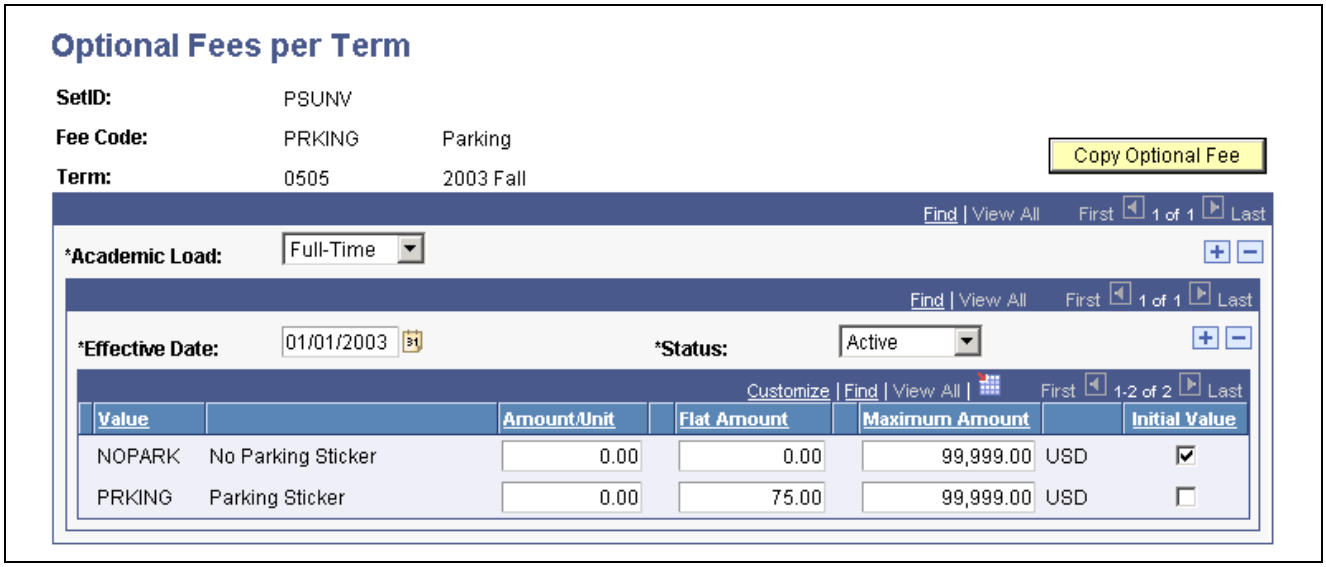
Stop Date Enter an optional stop date to specify the last day that the optional fee can be selected. The Optional Fees for a Student page functionality cannot be used to calculate or link students to an optional fee after this date. However, if changes are necessary, you can use the Optional Fees Override page.

No Change Date Enter an optional no change date after which enrollment changes do not affect the amount of optional fees charged.

One Fee for All Careers Select to charge students one fee regardless of the number of billing careers to which they are associated. If you clear this check box, the system charges students who are associated with more than one billing career once for each career.

Defining Optional Fee Amounts

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



Optional Fees per Term page

Academic Load Select an academic load as a criterion for the optional fee.

Optional Fee Parameters

Value Displays the fee code values and descriptions.

Amount/Unit Enter the amount to charge per enrollment unit.

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Flat Amount Enter a flat amount to charge regardless of units taken.

Maximum Amount Enter a maximum amount to charge any one student for this optional fee.

Initial Value Select to define a valid value as the default value of the optional fee. The system automatically selects the check box next to the default value that you specified in the Values page, but you can override the selection for a particular term.

Copy Optional Fee Click to copy an optional fee definition from one term to another.

Note. If you have specified start, stop, and no change dates on the Optional Fee - Term page, you might need to adjust the dates.

Setting Up Transaction Fees

To set up transaction fees, use the Transaction Fees component (TRANSACTION_FEES).

Transaction fees are additional fees that are charged to students in the event of an enrollment transaction such as the addition or dropping of a class. You set up transaction fees by term with an effective date for each term.

Page Used to Set Up Transaction Fees

Page Name	Definition Name	Navigation	Usage
Transaction Fees	TRANS_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Transaction Fees	Define transaction fees.

Defining Transaction Fees

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

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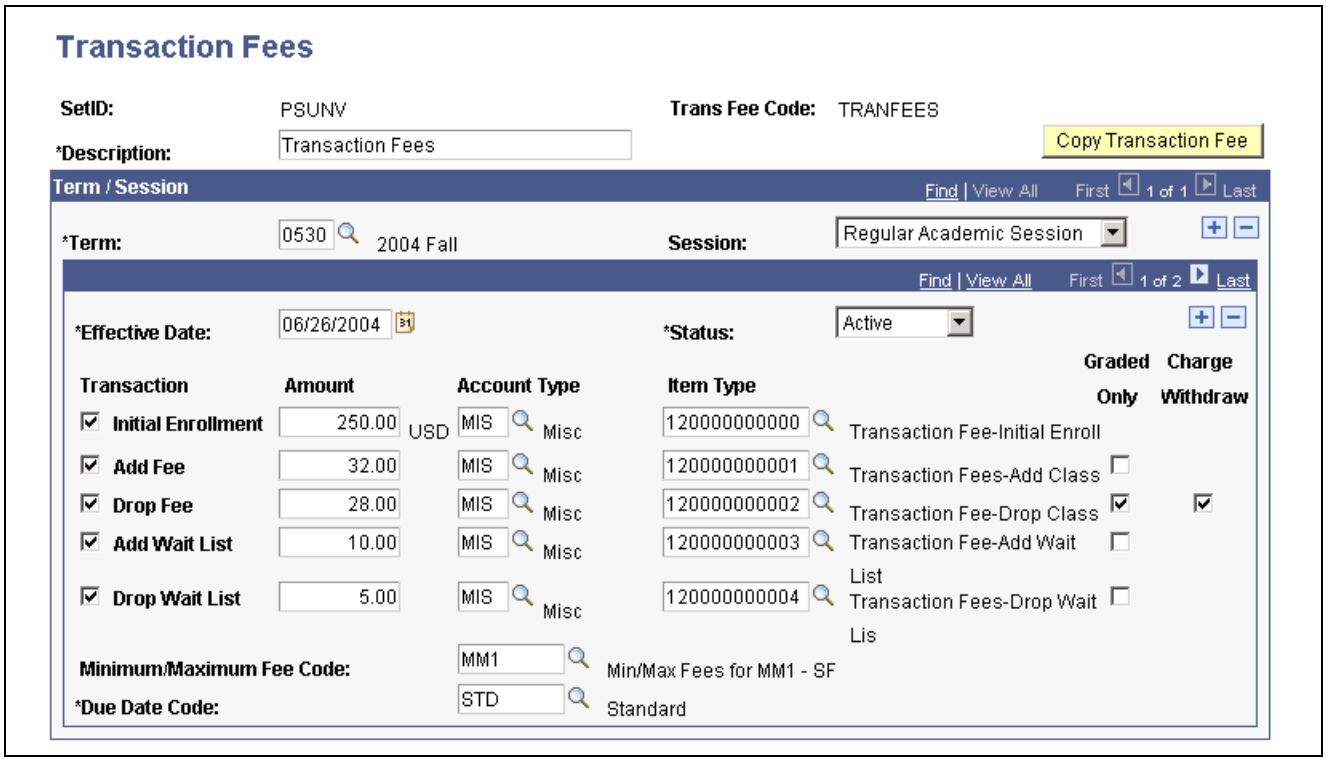

Transaction Fees page

Copy Transaction Fee Click to copy a transaction fee definition from one term to another. You will likely need to change the effective date when you use this button so that the transaction fee definition becomes active on the appropriate day of the additional term for which you are copying the fee.

Term Enter the term for which you want the transaction fee to apply.

Session To apply the transaction fee to more than one session within the term, specify the session.

Transaction Fee Definitions

Transaction Select the check box by the transaction fee that you want to define (Initial Enrollment, Add Fee, Drop Fee, Add Wait List, or Drop Wait List).

Amount Enter the amount of the transaction fee.

Account Type Select the account type to which you want the transaction fee to post.

Item Type Select the item type that you have defined for the transaction fee.

Graded Only Select to apply the transaction fee to graded classes only. If this check box is cleared, the transaction fee applies to audited and graded classes. This option is not available for initial enrollment transaction fees.

Charge Withdraw Select to charge the transaction fee when a student withdraws from school. This option is available with drop fee transaction charges only. If the check box is cleared, drop fee transaction charges are not applied when a student withdraws.

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Minimum/Maximum Fee Code Select an optional minimum/maximum fee code to apply to these transaction fees.

Due Date Code Select the due date code (billing and due calendar) that governs the transaction fee.

Setting Up Course List Fees

Bundle 30. The fee rollover process has been modified to skip any fees for terms that allow ITEM_SF installments and for which multiple sub-fees are attached.

To set up course list fees, use the Course List Fees component (CLST_FEE_PANEL).

Establish fees for all courses within a given course list.

Page Used to Set Up Course List Fees

Page Name	Definition Name	Navigation	Usage
Course List Fees	CLST_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course List Fees	Define course list fees.

Defining Course List Fees

Bundle 30. You cannot define multiple sub-fees for terms that allow ITEM_SF installments.

Access the Course List Fees page (Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course List Fees).

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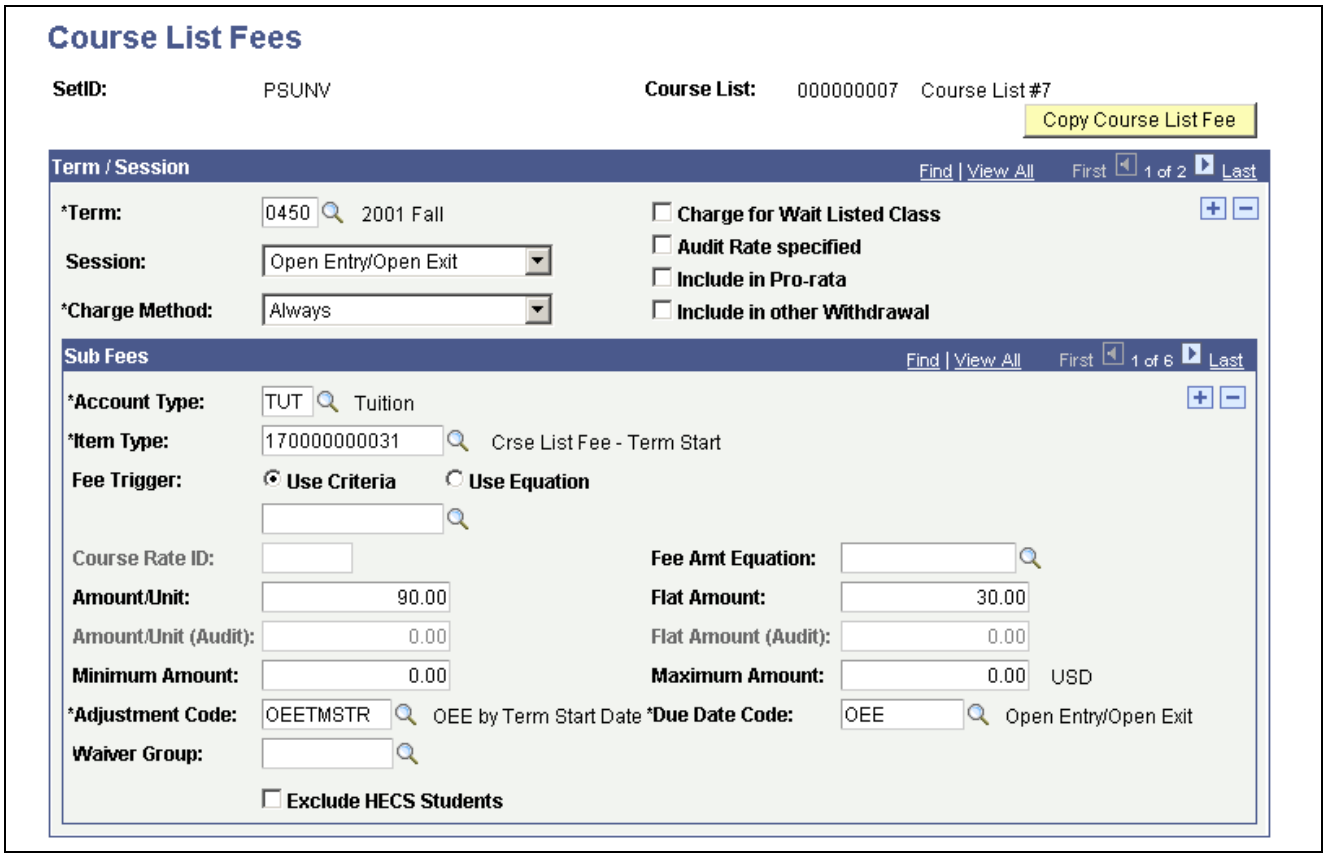

Course List Fees page

Copy Course List Fee Click to copy a course list fee definition from one term to another.

Term Enter the term in which the fee is charged.

Session Select the session in which the fee is charged.

Charge Method Select the charge method. Values are:

Always: The fee is charged in addition to term fees.

Not included in term tuition: The course is excluded from the term fee calculation and the course fee becomes the total cost of the class.

Charge for Wait Listed Class Select to charge the course fee to a wait listed student.

Audit Rate Specified Select to define a unique rate for audited courses. If you clear this check box, the system charges the regular rate to students auditing the course.

Include in Pro-rata Select to include the course fee in pro rata refund calculations.

Include in Other Withdrawal Select to include this fee in other withdrawal calculations. This selection is optional.

Course List Sub Fees

Account Type Enter the account type to which you want the course list fee posted.

Item Type Enter the item type to which you want the course list fee posted.

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Fee Trigger

To apply the course list fee to specific students, select either the Use Criteria option or the Use Equation option, and then select the predefined criteria or equation from the lookup. If you leave this field blank, the system charges the fee to all students who take the courses.

See lsfn, Working with Equation Engine.

Course Rate ID

Enter an optional course rate ID to control the application of the course list fee using student characteristics. This field is available only if the Equation field is blank and the Amount/Unit and Flat Amount fields have a value of *0.00*. You define course rate IDs using the Rate Tables for Course Fees page.

Fee Calculation Parameters

Using the following fields, you can control exactly how much the system charges for the course fee. Fees can be charged based on academic units, a flat fee, or a combination of the two. Amounts that you enter are not independent of each other. Rather, they are summed.

Fee Amt Equation (fee amount equation)

Enter an optional equation.

Amount/Unit

Enter the amount charge per unit.

Flat Amount

Enter a flat amount to charge regardless of units taken.

Amount/Unit (Audit)

Enter the amount to charge per unit for audited classes.

Flat Amount (Audit)

Enter a flat amount to charge for audited classes regardless of units taken.

Minimum Amount

Enter an optional minimum amount for the course list sub fee.

Maximum Amount

Enter an optional maximum amount for the course list sub fee.

Adjustment Code

Enter the adjustment code (calendar) to associate with this course list sub fee.

Due Date Code

Enter the due date code (calendar) to associate with this course list sub fee.

Waiver Group

Enter an optional waiver group that can offset course list sub fee charges.

Warning! If the wildcard feature was used when the course list was set up, the waiver group will apply to anyone who meets the waiver criteria and is enrolled in any of the subjects covered by the course list.

(AUS) Exclude HECS Students (exclude Higher Education Contribution Scheme students)

Select so that students are not charged twice for the same class if they are under multiple loan programs.

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See Also

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Establishing Criteria for Tuition Groups and Fee Triggers

PeopleSoft Student Financials 9.0 PeopleBook, Establishing Tuition Calculation Controls, Specifying Effective Terms for Installments

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Setting Up Adjustment Calendars

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

lsfn, Working with Equation Engine

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Defining Waivers and Waiver Groups

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Creating Billing and Due Date Calendars

Setting Up Tuition Groups

To set up tuition groups, use the Tuition Groups component (SEL_GROUP_PANEL).

This section provides an overview of tuition groups and discusses how to:

- Define tuition groups.
- Link adjustment codes to tuition groups.
- Link criteria to tuition groups.
- Link term fee codes to tuition groups.
- Link a waiver code to a single term fee within a tuition group.
- Link course lists to tuition groups.
- Link waiver codes to tuition groups.
- Review established tuition group priorities.

Understanding Tuition Groups

Tuition groups enable you to combine large groups of students who are charged, generally, the same set of fees under the same rules. Within the tuition group definition, you use adjustment codes, term fee, course list, and waiver definitions to fine-tune charges and adjustments (refund rules) so that students receive the correct charges for their unique situations. Because so much flexibility is in the components that compose the tuition group, you can define relatively few tuition groups to control all tuition calculations. Students might be assigned to a tuition group as they are activated for a term or be automatically assigned to the correct group using criteria that you have defined when tuition is calculated. You can also override the system-assigned tuition group on an individual student basis.

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Pages Used to Set Up Tuition Groups

Page Name	Definition Name	Navigation	Usage
Tuition Groups - Definition	SEL_GROUP_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Groups, Definition	Define tuition groups.
Tuition Groups - Adjustment Codes	SEL_GROUP_ADJ_CODE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Groups, Adjustment Codes	Link adjustment codes to tuition groups.
Tuition Groups - Criteria	GROUP_CRITR_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Groups, Criteria	Link criteria to tuition groups.
Tuition Groups - Term Fees	GROUP_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Groups, Term Fees	Link term fees to tuition groups.
Term Fee Waivers	GRP_FEE_WAIVER	Click the Waivers link on the Tuition Groups - Term Fees page.	Link a waiver code to a single term fee within a tuition group.
Tuition Groups - Course Lists	GROUP_CLST_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Groups, Course Lists	Link course lists to tuition groups.
Tuition Groups - Waivers	GRP_WAIVER_TABLE	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Groups, Waivers	Link waiver codes to tuition groups.
Tuition Group Priority	SEL_GROUP_PRIORITY	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Group Priority	Review established tuition group priorities.

Defining Tuition Groups

Bundle 30. New check boxes: Assess Past Installments and Adjust Billed Installments

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

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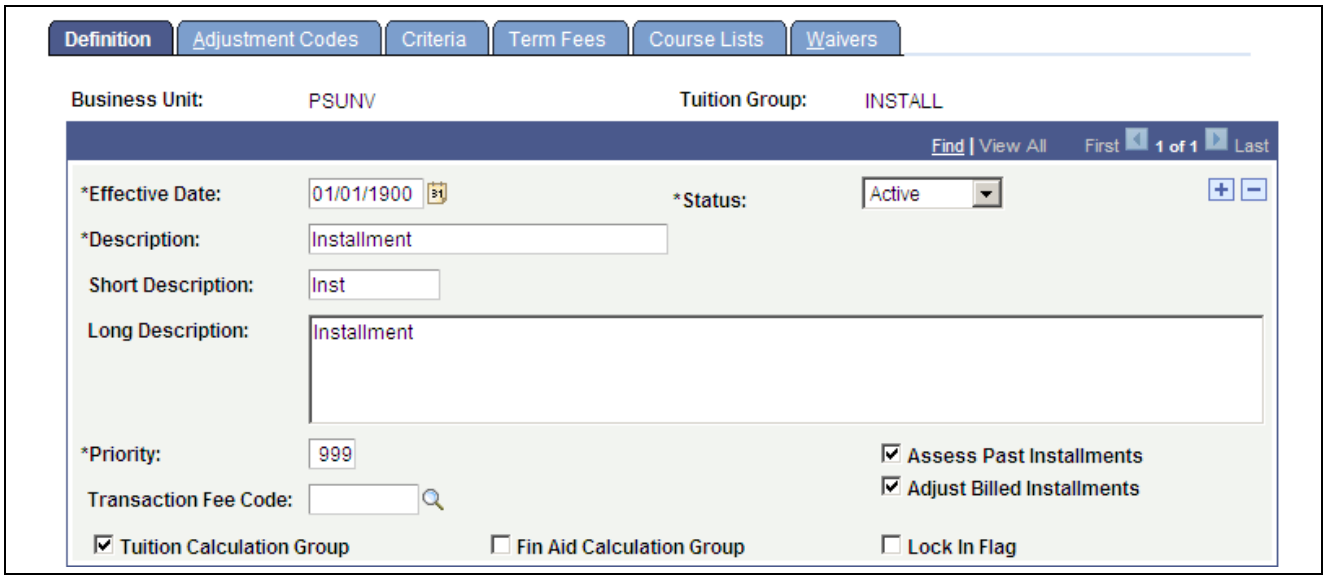

Tuition Groups - Definition page

Bundle 30. Added information about using a different tuition group if user needs to create other ITEM_SF installment dates.

If you need to create another set of ITEM_SF installment dates, you must place the student in a different tuition group. If you use the same tuition group, the tuition group will not post again the ITEM_SF installments or waivers with a different set of due dates.

Priority

If a group of students cannot be categorized into one tuition group, you must define the preferred tuition group with a higher priority. For example, if your institution offers a combined JD/MBA program, students could be assigned to one of three tuition groups (JD, MBA, or JD/MBA). By setting a higher priority (lower number) for the JD/MBA group, you ensure that students are charged appropriately.

Transaction Fee Code

Select an optional transaction fee code.

Assess Past Installments

Bundle 30. New

Select to allow all fees in the tuition group to be created with ITEM_SF installments that have past-due billing dates even if each fee uses a different due date calendar. By default, this check box is deselected.

This check box appears *only* if Create Tuition Installments is selected on the SF Installation 2 page and the business unit *does not* reference an institution where the DEST, HECS, Centrelink, TAC, or NZQA check boxes are selected.

See PeopleSoft Student Financials 9.0 PeopleBook, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords, Defining Keyword Edit Tables, a Null Due Date, and Enabling Tuition Installments.

Adjust Billed Installments

Bundle 30. New

Select to tell the tuition calculation process whether to adjust billed ITEM_SF installments or display an error message. By default, this check box is deselected.

This check box appears *only* if:

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- Create Tuition Installments and Enable Billed Adjustments are selected on the SF Installation 2 page
- the business unit *does not* reference an institution where the DEST, HECS, Centrelink, TAC, or NZQA check boxes are selected

If the Adjust Billed Installments check box is deselected and you adjust a fee where the adjustment exceeds the remaining unbilled ITEM_SF installments, an error message is logged. To do the adjustment, you can only unbill the previous ITEM_SF installments until the amount can be adjusted across the remaining unbilled ITEM_SF installments.

The Adjust Billed Installments check box also determines whether you can change a tuition group. When the tuition group is calculated or overridden in SFPGRPCL, an error is logged if the:

- Adjust Billed Installments check box is deselected
- current tuition group is different from the previous group
- previous tuition group has billed ITEM_SF installments

When these conditions are met, you should not reverse fees.

See PeopleSoft Student Financials 9.0 PeopleBook, Completing Student Financials General Setup, Setting Up Installation Parameters and Keywords, Defining Keyword Edit Tables, a Null Due Date, and Enabling Tuition Installments.

Tuition Calculation Group Clear this check box if you do not want to use this tuition group for actual tuition calculation.

Fin Aid Calculation Group (financial aid calculation group) Select to enable this definition to be used for calculating projected fees for financial aid budgets.

Lock In Flag Select to lock in a minimum amount of tuition for the group at a specified point in the term.

See Also

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

Linking Adjustment Codes to Tuition Groups

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

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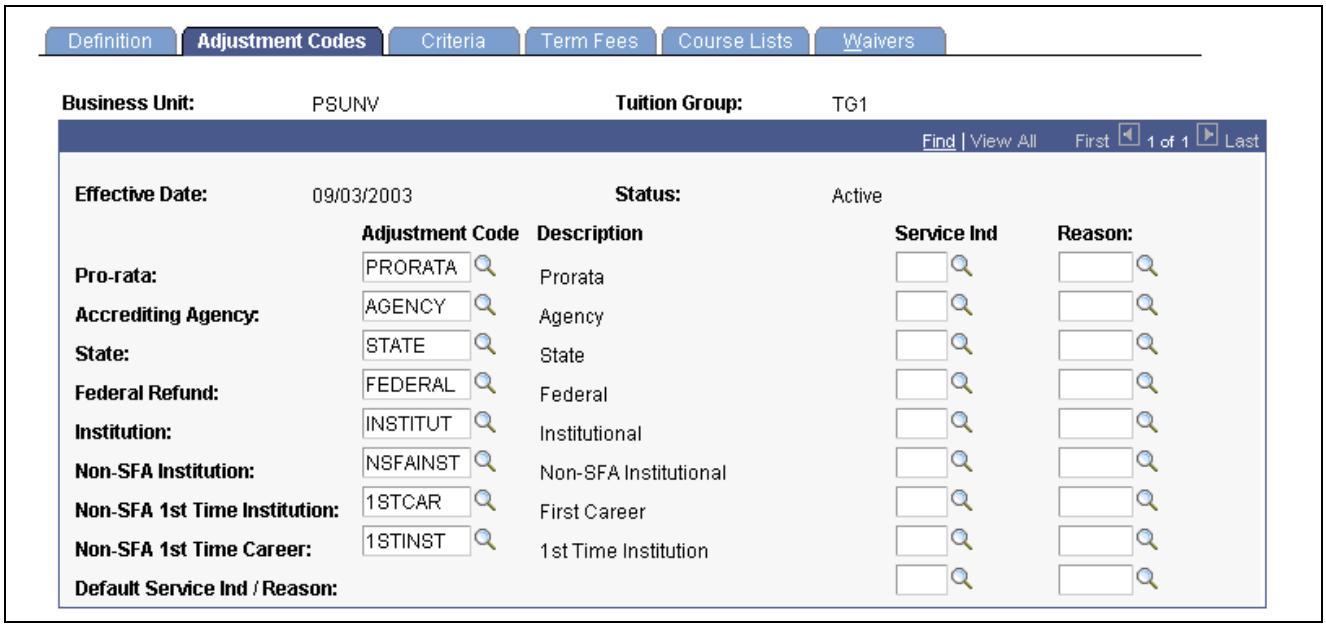

Tuition Groups - Adjustment Codes page

Select adjustment codes to determine the refund schedules for members of a tuition group. Some refund schedules are mandated by a state government or agency, or by the federal government. Your institution can also devise and apply its own refund schedule. Federal regulations require that refunds for students that receive federal financial aid be calculated using the refund table most advantageous to the student.

Pro-rata — Enter the adjustment code that you have defined for pro rata refund calculations. The pro rata refund is applied to first-time students who withdraw.

Accrediting Agency — Enter the adjustment code that you have defined to meet the refund requirements of your accrediting agency for students who withdraw.

State — Enter the adjustment code that you have defined to meet your state refund requirements agency for students who withdraw.

Federal Refund — Enter the adjustment code that you have defined to meet federal refund requirements for students who withdraw.

Institution — Enter the adjustment code that you have defined for your institution for students who withdraw. This is the adjustment code that the system uses if no other schedules supersede it.

Non-SFA Institution (nonfederal student financial aid institution) — Enter the adjustment code that you have defined for students who withdraw but do not receive any federal financial aid.

Non-SFA 1st Time Institution — Enter the adjustment code that you have defined for students who withdraw but do not receive any federal financial aid and are attending your institution for the first time (first term).

Non-SFA 1st Time Career — Enter the non-SFA 1st time career schedule that your institution applies by career for students who are first-time students, who do not receive any federal financial aid, and who withdraw.

Service Ind (service indicator) — Enter an optional service indicator code to apply to the student upon his or her withdrawal.

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Upon the student's withdrawal, if the reason in the term history/withdrawal component is the same as the reason that you set on the Tuition Group Adjustment code page, the service indicator is set for the student.

Reason Enter an optional service indicator reason.

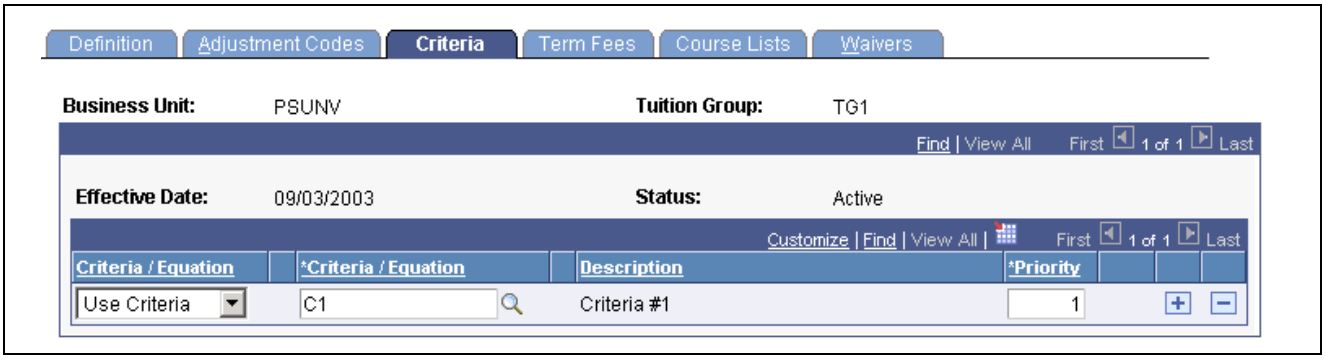
Default Service Ind/Reason (default service indicator and reason) Enter an optional service indicator and reason to use as default values.

See Also

lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Setting Up Adjustment Calendars

Linking Criteria to Tuition Groups

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



Tuition Groups - Criteria page

Criteria Select the criteria to select students for inclusion in the tuition group. You must attach at least one criteria code.

Priority When you use more than one criteria code, connect them with an OR operator and provide a priority rating.

Linking Term Fees to Tuition Groups

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

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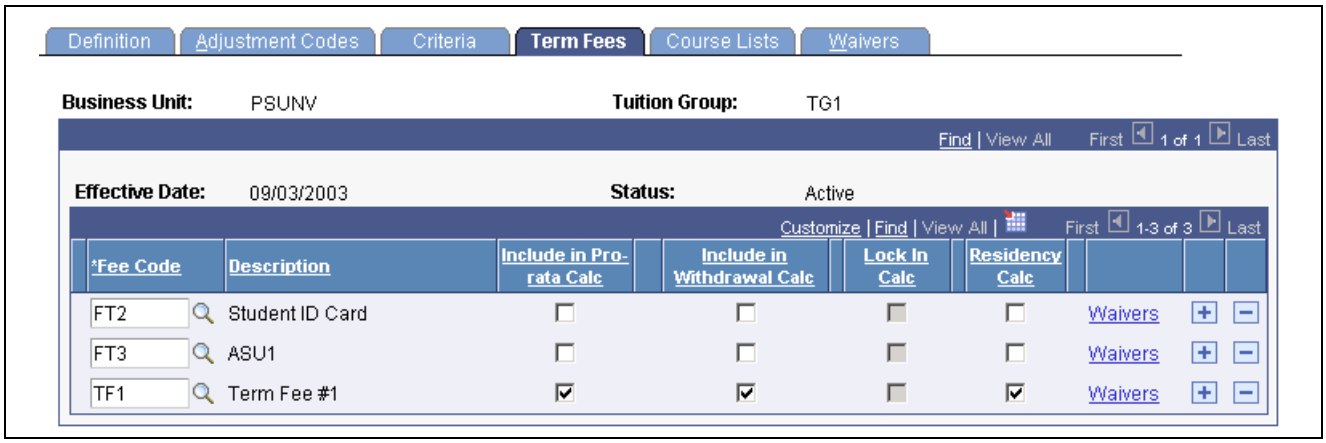

Tuition Groups - Term Fees page

Fee Code Enter the term fee code that you want to link to this tuition group. You must link at least one term fee code, but you can add as many term fee codes as necessary to cover fees for all members of the tuition group.

Description The term fee description appears in this field.

Include in Pro-rata Calc (include in pro rata calculation) Select to include the term fee in a pro rata refund calculation in the event that the student withdraws.

Include in Withdrawal Calc (include in withdrawal calculation) Select to include the term fee in a withdrawal calculation if the student withdraws.

Select this check box when tuition calculation adjustments for a withdrawal require different calendars and calculations for specific term fees.

If you select this check box, the tuition calculation adjustment process for withdrawals uses the applicable adjustment calendar that is designated on the Tuition Groups - Adjustment Codes page.

If you clear this check box, the tuition calculation adjustment process for withdrawals uses the adjustment calendar that is defined on the Term Fees - Term Fees page for this specific term fee.

Selecting this check box does not override an adjustment reason in PeopleSoft Student Records. Nor does it exempt a fee from the withdrawal adjustment calculation.

To use the adjustment calendar that is associated with the term fee when you are adjusting tuition on a withdrawal, be sure to create a row for withdrawal in the setup of the adjustment calendar that you have specified on your term fee.

See lssf, Setting Up Fees and Tuition Groups, Setting Up Term Fee Codes, Defining Term and Session Fees.

Lock In Calc (lock in calculation) Select to lock in charges for this term fee at a specified point in the term. This option is available only if the Lock in Calc check box has been selected on the Definition page.

Residency Calc (residency calculation) Select to include the term fee in tuition residency calculation.

Waivers Click to define waivers that are specific to one term fee.

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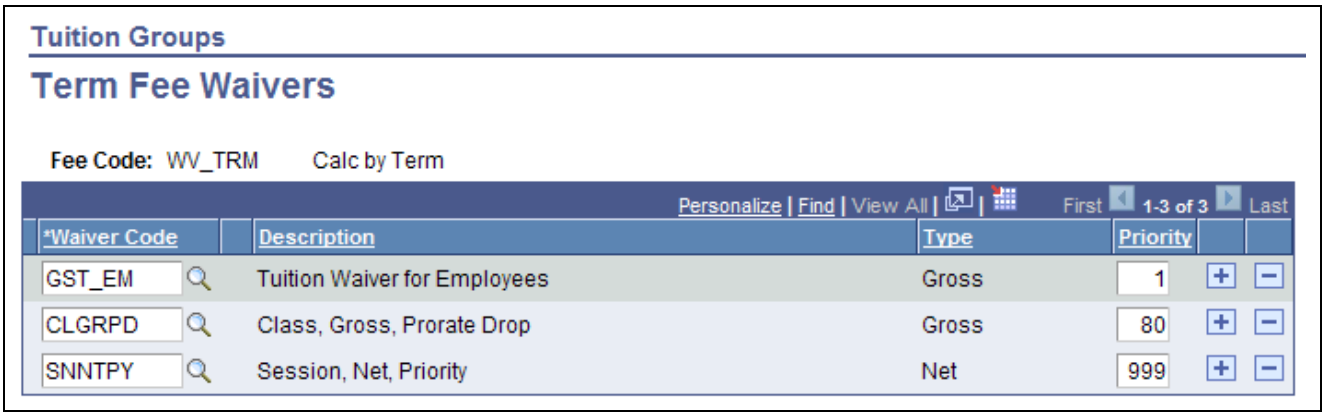
See Also

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

Linking a Waiver Code to a Single Term Fee Within a Tuition Group

Access the Term Fee Waivers page (click the Waivers link on the Tuition Groups - Term Fees page).



Term Fee Waivers page

Waiver Code

Select the waiver code to apply to the term fee to waive charges. Waivers that are attached at this level apply only to the specific term fee and not to the tuition group as a whole.

Priority

Enter a number from 1 to 998 to indicate the priority in which waivers should be calculated. The default value is 999 and indicates no priority. The lower the number you use, the higher the priority.

You can assign the same priority number to multiple waiver codes. If the waiver codes have the same priority number, then the priority is calculated based on alphabetical order.

Note. When prioritizing a combination of the two waiver types, typically the Waiver Type of Gross should have a higher priority than Waiver Type of Net.

Linking Course Lists to Tuition Groups

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

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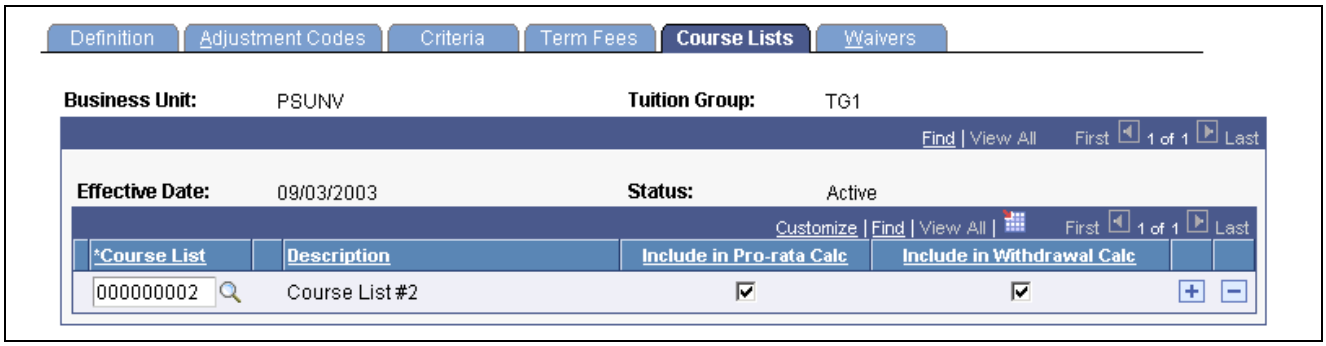


Tuition Groups - Course Lists page

Course List Enter the course list that you are linking to the tuition group.

Include in Pro-rata Calc (include in pro rata calculation) Select if you want the course list fees included in any pro-rata calculation.

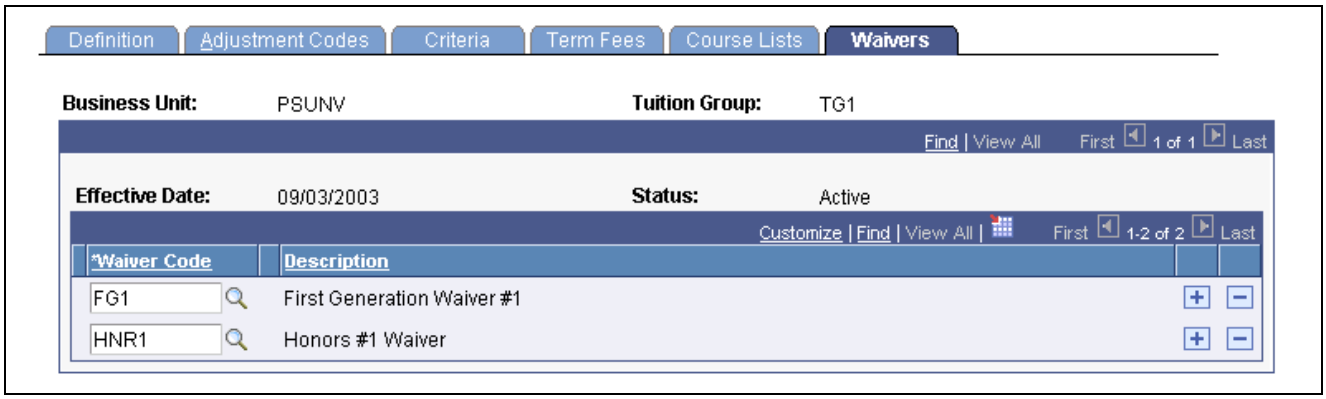
Include In Withdrawal Calc (include in withdrawal calculation) Select if you want the course list fees included in any withdrawal calculations for this tuition group.

See Also

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

Linking Waiver Codes to Tuition Groups

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



Tuition Groups - Waivers page

Waiver Code Select the waiver code to link to the tuition group. Waiver codes that are linked at this level apply to all term fees that are attached to the tuition group.

Note. You cannot use the Student Waiver Assignment functionality or Prorate Dropped Unit functionality for waiver codes that are linked to tuition groups.

See [PeopleSoft Student Financials 9.0 PeopleBook]Defining Waivers and Waiver Groups .

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Reviewing Established Tuition Group Priorities

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

The Tuition Group Priority page lists all tuition groups that are defined for your institution, provides a description of the tuition groups, and displays their priority. Use this page to confirm that potentially competing tuition group definitions have the correct priority ratings.

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