CHAPTER 1

Setting Up Student Financials Self Service

This chapter discusses how to:

- Set up Payment merchants.
- Set up SF merchants.
- Set up institution sets.
- Set up self-service options.
- Set up miscellaneous fees.
- Set up self-service payment messages.

Prerequisites

Before students can make payments through Student Financials self service, you must:

- Set up SF business units.
- Establish charge priorities.
- Establish payment overall priorities.
- Establish an SF term default.
- For each SF institution set established, you must create a corresponding setID and define the corresponding tableset control value, particularly for SF11_WEB (Internet Pymnts — INSTITUTION SET).
- Establish at least one Payment Merchant per third party merchant ID.
- Establish at least one SF merchant ID per payment type (credit card, eCheck, or both) that is to be supported by your institution.
- Select the Accept Self-Service Payments check box on all appropriate SF institution set parameters.
- Assign an SF institution set to students.

See lssf, Completing Student Financials General Setup, Setting Up Business Units and lssf, Setting Up ePayment Processing, Setting Up SF Merchants.

Setting Up Payment Merchants

Setting up Payment merchants enables you to set up electronic payment merchants and support the ePayment API framework.

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

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

Setting Up SF Merchants

Setting up SF merchants enables you to set up unique credit card and eCheck processing rules for different departments in your institution.

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

Setting Up Institution Sets

This section provides an overview of institution sets and discusses how to:

- Define basic institution set parameters.
- Define self-service electronic payments (ePayments) for institution sets.
- Define self-service business units for institution sets.

Understanding Institution Sets

An institution set enables you to define parameters for the PeopleSoft Student Financials self-service pages, and for self-service ePayment usage for one or more business units in an institution.

Institution sets hide the complexity of multiple business units from the student, and enable students to access information and pay charges toward multiple business units. Institutions with only one business unit can preserve their single-unit character by attaching only one business unit to their institution set.

You must set up an institution set and attach it to each student for any self-service features to function. You attach the institution set to students through the User Profile process in PeopleSoft Campus Community or individually through Student Financials Security.

See Also

lssf, Completing Student Financials General Setup, Setting Up Business Units

lsfn, Creating and Maintaining User Profiles

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Pages Used to Set Up Institution Sets

Page Name	Definition Name	Navigation	Usage
General Options	INSTITUTION_SET_01	Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, General Options	Define basic institution set parameters.
Electronic Payments	SSF_INST_SET_03	Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Electronic Payments	Define parameters of electronic payments.
Institution Set Privacy Policy	SSF_INST_SET_04	Click the Privacy Policy link on the Electronic Payments page.	Define a privacy policy for your institution.
Business Units	INSTITUTION_SET_02	Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Business Units	Define business unit parameters.

Defining Basic Institution Set Parameters

Bundle 30. New check box: Allow Change in Country

Access the General Options page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, General Options).

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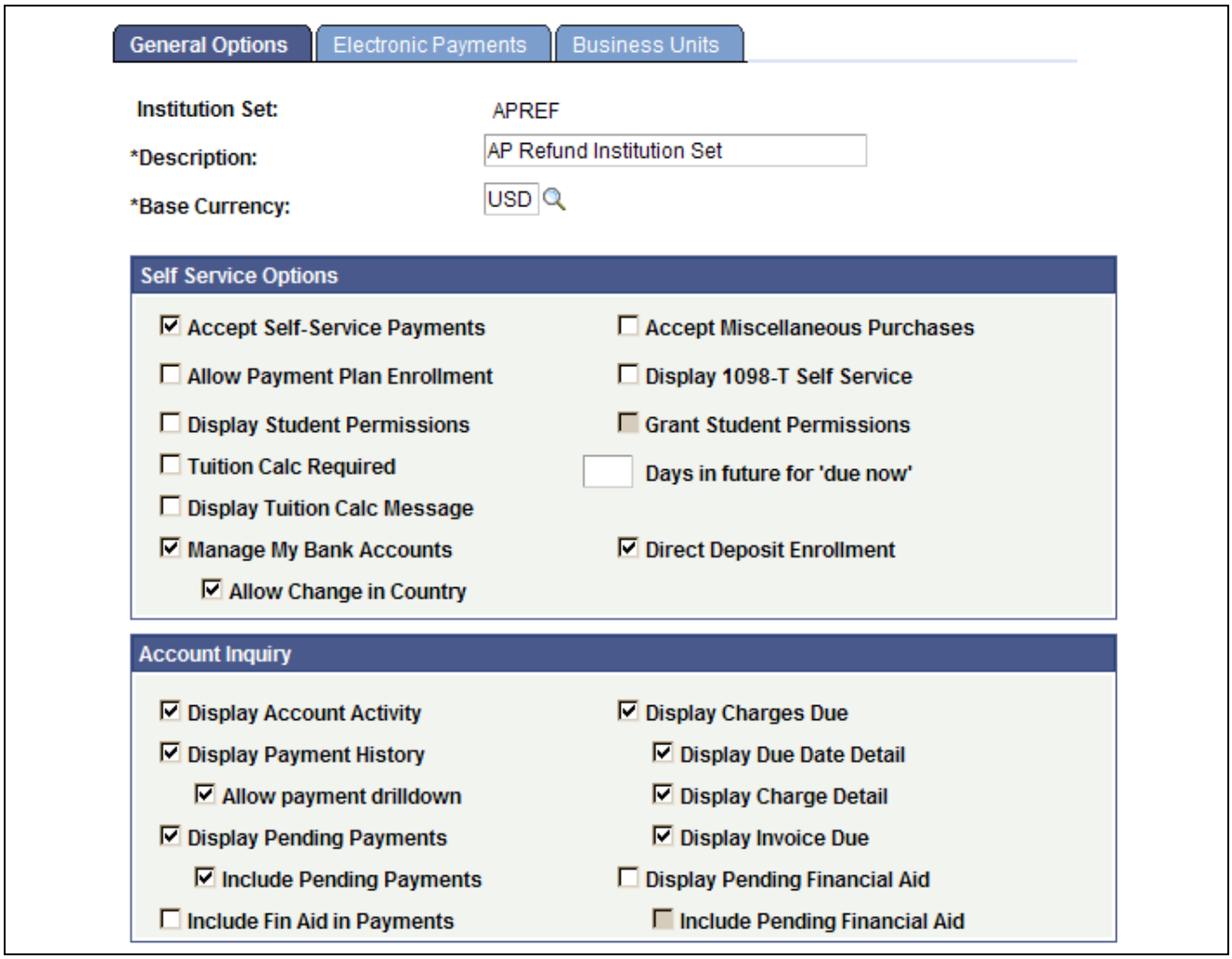
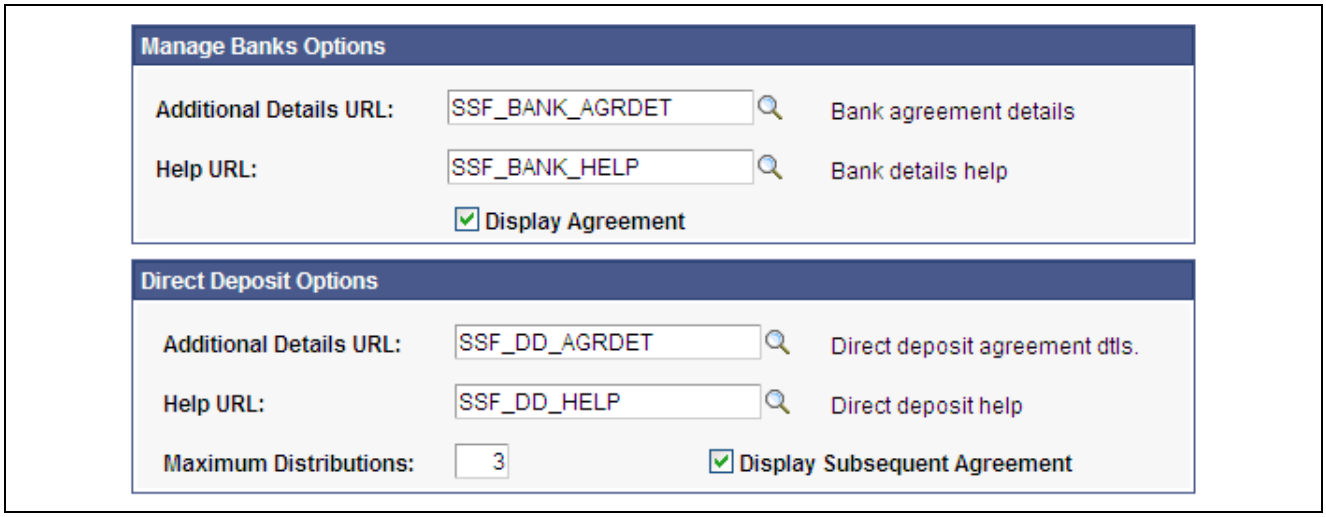


General Options page (1 of 2)



General Options page (2 of 2)

Base Currency Select the type of currency that you want to use for your credit card transactions. The default value for this field is the base currency from SF Business Unit setup.

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Self Service Options

Accept Self Service Payments

Select to accept self-service payments over the internet. This selection is specific to this institution set, not to the SF business units that are attached on the Business Units page. Selecting this option requires that you attach at least one SF business unit that is defined to accept self-service payments.

Accept Miscellaneous Purchases

Select to allow students to select and purchase items or services. This flag controls whether the Accept Miscellaneous Purchases option appears in the Other Financial drop-down list in Student Center and whether the link appears at the bottom of the Account Inquiry page.

Allow Payment Plan Enrollment

Select to allow students to enroll in payment plans. This flag controls whether the Payment Plan option appears in the Other Financial drop-down list in Student Center and whether the link appears at the bottom of the Account Inquiry page.

Display 1098–T Self Service

Select to display and to allow access to the 1098-T Self Service option for students in this institution set. This check box controls whether the 1098-T option appears in the other financial drop-down list box in Student Center and whether the link appears at the bottom of the Account Inquiry page.

Display Student Permissions

U.S. Department of Education regulations require that federal financial-aid awards be used to pay only allowable charges for the period of enrollment covered by the aid year in which those funds were awarded. Regulations require schools to collect individual authorization from a student to allow funds to pay for nonallowable charges such as library fines and parking fees or for charges for the prior year immediately preceding the current aid year.

Select to allow access to the Grant Student Permissions option for students in this institution set.

The student cannot revoke permission using Self Service; only the administrator can do this.

Grant Student Permissions

Select to display and to allow access to the Grant Permissions option for students in this institution set.

This check box appears only if the Display Student Permissions check box is selected.

Tuition Calc Required
(tuition calculation required)

Select if you want the system to automatically calculate tuition whenever a student accesses the Account Inquiry component or the Make a Payment component. The system calculates tuition in self service only if the following four conditions are met:

- The self service Tuition Calc Required check box in the SF Institution Set component is selected.
- The Calc Required column value is equal to *Y* in the STDNT_CAR_TERM table.
- The student is activated in the term.
- The Auto Calculate Self Service check box on the Tuition Calculation Control page is selected for the term.

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See lssf, Setting Up Tuition Controls, Criteria, Equations, and Waivers, Establishing Tuition Calculation Controls, Specifying Tuition Calculation Parameters.

Note. The system does not automatically calculate tuition when a student accesses the Student Center. In addition, tuition calculation is never invoked from the Student Services Center or Student Services Center (Student). Therefore, consider selecting the Display Tuition Calc Message check box so that the student knows that the balance that appears on the Student Center might not reflect recent changes and the student has to access the Account Inquiry page for the updated balance.

Consider your use of the Tuition Calc Required check box carefully. Requiring tuition calculation uses a great deal of system processing resources, but account balances might not otherwise reflect recent changes.

Display Tuition Calc Message

Select to display the following tuition calculation messages for students:

- If you select the Tuition Calc Required check box and the Auto Calculate Self Service check box, and the Calc Required column value is equal to *Y* in the STDNT_CAR_TERM table for a student, this message appears on the Student Center page: *This may not reflect recent changes to your tuition and fees. For an updated balance, click on Account Inquiry.*
- If you do not select the Tuition Calc Required check box, then regardless of the Calc Required column value and whether you select the Auto Calculate Self Service check box, this message appears on the Student Center, Account Summary, and Charge Details pages: *This may not reflect recent changes to your tuition and fees.*

Days in future for 'due now'

Based on the number of days you enter here, the system controls the due now and future due dollar amounts displayed on the Student Center page as well as on the Account Inquiry - Account Summary page. The formula used to calculate the due now amount is any charges incurred through the current date plus the number of days specified in this field. The formula used to calculate the future due amount is any charges incurred after the current date plus the number of days specified in this field. Any charges incurred through the current date plus the number of future days entered in this field controls both the amount due now and the future due amount. Enter the number of future days.

For further information, refer to the *Example of How the Days in Future Field Is Calculated* documentation later in this chapter.

Manage My Bank Accounts

Select to enable the Manage My Bank Accounts component in Self Service. Students use the component to set up and maintain their bank account details.

Allow Change in Country

Bundle 30. New

Select to allow students to set the country and currency of their bank account in the Manage My Bank Accounts Self Service page. Otherwise, the country is derived from the HRMS Installation setup and the currency is derived from the SF Institution Set setup.

This check box is available only when you select the Manage My Bank Accounts check box. By default, Allow Change in Country is deselected.

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See PeopleSoft Campus Self Service 9.0 PeopleBook, Using Student Financials Self Service, Using Account Services.

Direct Deposit Enrollment If you select this check box, the Enroll in Direct Deposit component is available in Self Service. Students use the component to enroll in direct deposit and specify how refunds are distributed between their bank accounts.

See [PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook - Update 1, Using Student Financials Self Service].

Example of How the Days in Future Field Is Calculated

This table is an example of how charges and payments are displayed, based on what you define in the Days in future for ’due now’ field:

Charge	Date Incurred	Amount
Tuition	July 1, 2006	1,000.00 USD
Fee	September 5, 2006	50.00 USD
Room	November 1, 2006	500.00 USD

If the current date is September 1, 2006, and you enter *35* in the Days in future for ’due now’ field, then the due now charges will equal 1,050.00 USD and the future due will equal 500.00 USD.

If the current date is October 1, 2006, and you enter 35 in the Days in future for ’due now’ field, then the charges due now will equal 1,550.00 USD, and the future charges will equal zero.

Account Inquiry

The selections made in this group box determine what students see in the Account Inquiry self-service component (SSF_SS_ACCT_SUMM). For instance, if you clear the Display Account Activity check box, students do not see the activity page. Check boxes that are indented below a check box refer to more specific options related to the display feature on that page.

Display Account Activity Select to display the Account Activity page, including charges, payments, financial aid, and refunds for the student. The activity is controlled by filter options on the activity page—the system displays six months of activity by default.

Display Charges Due Select to display the Charges Due page. Four grids are displayed on this page, three of which are optional: Display Due Date Detail, Display Charge Detail, and Display Invoice Due.

The Display Charges Due grid rolls up all charges by unique due date to be presented as a summary to the student.

The Display Due Date Detail grid displays the details of all charges rolled up by unique due date.

The Display Charge Detail grid displays the details of each charge. On this grid, the student has the opportunity to look deeper into charges containing multiple due dates.

The Display Invoice Due grid display details of charges by billing invoice ID date.

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Display Payment History	Select to display the Payments page. You can also choose to allow payment drilldown. For any successfully posted payments, the student can see which charges were reduced by those payments if the Allow payment drilldown check box is selected.
Display Pending Payments	Select to display the student's pending payments on the following pages: Account Inquiry - Account Summary tab: What I Owe grid. Account Inquiry - Payments tab: Pending Payments grid. If this check box is cleared, then the student's pending payments do not appear anywhere in self service.
Include Pending Payments	If this check box is selected, then the student's balance is reduced by the pending payment amount. This check box must be used in conjunction with the Display Pending Payments check box for the remaining balance amount to be reduced by any pending payments made. If this check box is selected, the total due amount is reduced by the pending payment amount on the Account Inquiry - Account Summary tab: What I Owe grid. If this check box is cleared, then the total due amount is not reduced by the pending payment amount on the Account Inquiry - Account Summary tab: What I Owe grid. The remaining balance amount is not reduced by the pending payment amount.
Display Pending Financial Aid	Select to display anticipated aid as a line item on the Account Inquiry - Account Summary tab: What I Owe grid and the Account Inquiry - Pending Financial Aid page. If this check box is selected, anticipated aid appears on the pages as a line item only and does not reduce the remaining balance amount. Students are informed of any anticipated aid, but their total charges are not reduced by the anticipated aid. If this check box is cleared, then the student's anticipated aid does not appear anywhere in the Account Inquiry self-service component (SSF_SS_ACCT_SUMM).
Include Pending Financial Aid	If this check box is selected, the student's balance is reduced by the anticipated aid amount. This check box must be used in conjunction with the Display Pending Financial Aid check box for the remaining balance amount to be reduced by any anticipated aid. If this check box is selected, the total due amount is reduced by the anticipated (or pending financial) aid amount on the Account Inquiry - Account Summary tab: What I Owe grid. If it is cleared, then the total due amount will not be reduced by the anticipated aid amount on the Account Inquiry - Account Summary tab: What I Owe grid. The remaining balance amount is not reduced by the pending financial aid amount.
Include Fin Aid in Payments (include financial aid in payments)	Select to include financial aid disbursements with all other payments. If this check box is cleared, financial aid disbursements appear in a separate financial aid activity line on the Payment History page. If your institution does not disburse financial aid, select this option to eliminate financial aid activity lines.

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Manage Bank Options

This group box provides additional configuration for bank account setup and maintenance.

Additional Details URL

The values available in this field are based on the PeopleTools URL identifier.

If you select a value here, the Additional Details link appears on the Manage My Bank Accounts - Agreement page. When students click the link, they access the URL that you have set up here.

Help URL

The values available in this field are based on the PeopleTools URL identifier.

If you select a value here, the Help link appears on the Manage My Bank Accounts - Add Bank Account Details page and the Manage My Bank Accounts - Edit Bank Account Details. When students click the link, they access the URL that you have set up here.

Display Agreement

If you select this check box, the Manage My Bank Accounts - Agreement page appears when students create their initial bank account and the Agreement table (Bank Account) is updated.

The agreement does not appear when students add subsequent bank information.

Direct Deposit Options

This group box provides additional configuration for direct deposit setup and maintenance.

Additional Details URL

The values available in this field are based on the PeopleTools URL identifier.

If you select a value here, the Additional Details link appears on the Enroll in Direct Deposit - Agreement page. When students click the link, they access the URL that you have set up here.

Help URL

The values available in this field are based on the PeopleTools URL identifier.

If you select a value here, the Help link appears on the Enroll in Direct Deposit - Add Direct Deposit page and the Enroll in Direct Deposit - Edit Direct Deposit page. When students click the link, they access the URL that you have set up here.

Maximum Distributions

Use this field to control the maximum number of direct deposit distributions that a student can set up in Self Service.

A value of *1* appears by default.

You can only enter whole numbers—for example, 4.5 is not allowed.

Enter a value of 1 if you want refunds to always be disbursed to only one account.

Display Subsequent Agreement

If you select this check box, then, after the student has signed an initial agreement (using the Direct Deposit Agreement page - DD Enroll), an Agreement page appears every time that the student edits the direct deposit instructions. The Agreement table (DD Change) is also updated. (The Direct Deposit Agreement page does not require any setup here—it appears automatically when a student enrolls in direct deposit).

See [PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook - Update 1, Using Student Financials Self Service, Using Account Services].

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See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1]Completing Student Financials General Setup .

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1]Setting Up Refunding .

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook - Update 1]Refunding Customers .

Note. UPK for setting up AP Direct Deposit is also available

See AP Direct Deposit Setups UPK in My Oracle Support, ID 1282397.1.

Defining Self-Service ePayments for Institution Sets

A flexible interface supports the processing of credit card and eCheck transactions. The interface uses a flexible adapter-based model to support the transmission of electronic payment transactions. You can use either the Integration Broker-based interface or the Business Interlinks interface to send electronic payment transactions to third party payment processors.

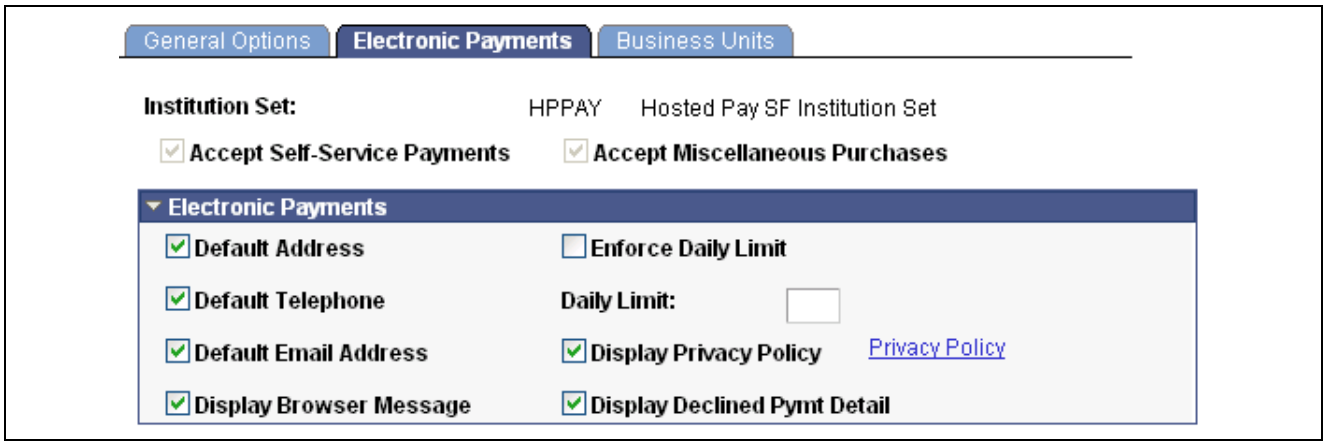
If you use Integration Broker, it supports the capture of the Security Code. Capturing this code lowers your transaction costs and increases fraud deterrence on card not present transactions.

See lssf, Setting Up ePayment Processing.

See lssf, Processing ePayment Transactions.

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

Access the Electronic Payments page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Electronic Payments).



Electronic Payments page (1 of 2)

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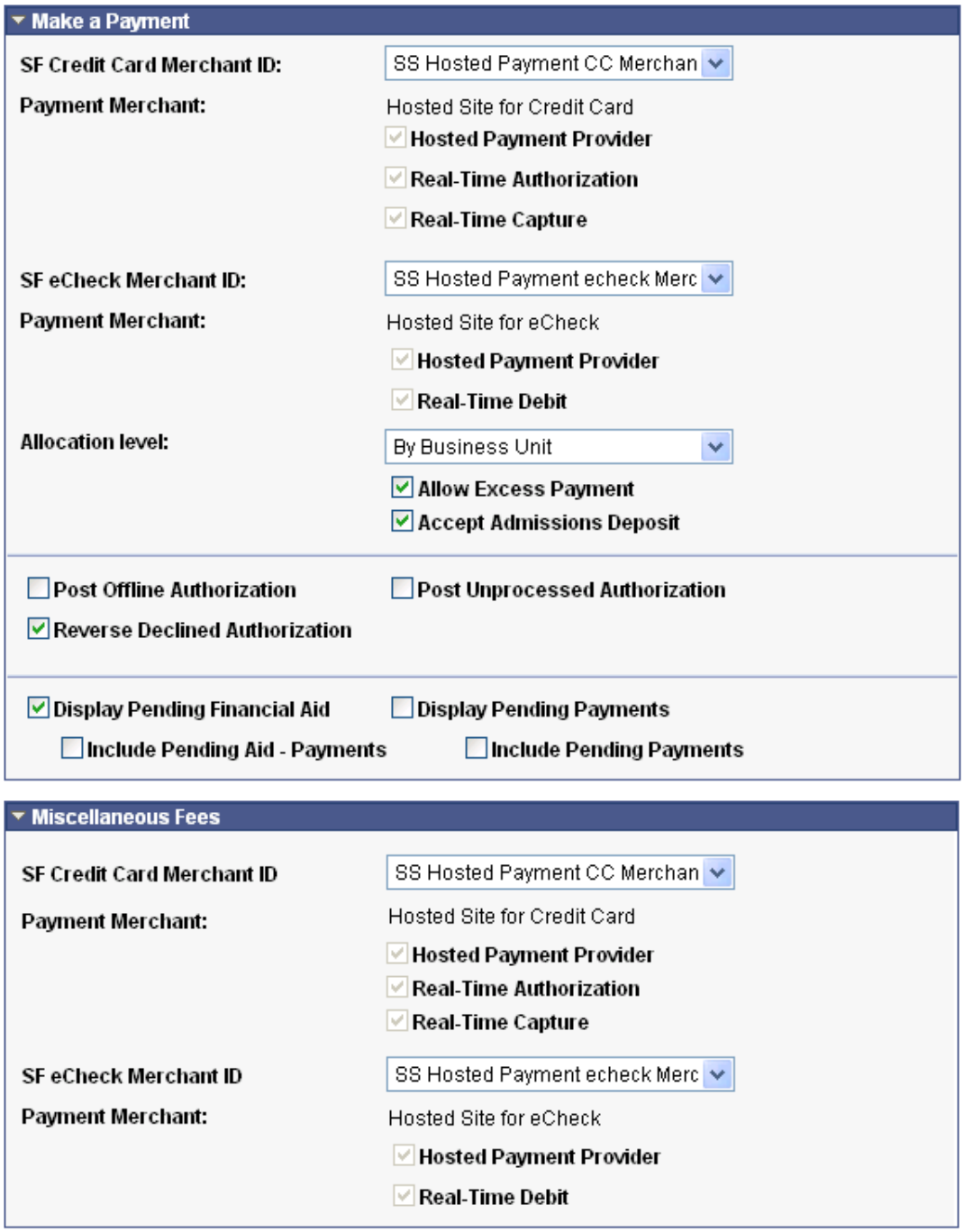

Electronic Payments page (2 of 2)

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Note. Most of the fields on the Electronic Payments page are specific to each business unit in the institution set, not to the institution set as a whole. If you have multiple business units associated with the institution set, be sure to insert a row and enter the information on the Electronic Payments page for each business unit. Also, if you have more than one business unit associated with your institution set, you must enter a priority ranking for each (see following). The exceptions to this are the service impact and service indicator codes, which are institution set-specific, not business unit-specific.

To control what charges the student can pay towards in self service, you must ensure that the item type contains the correct charge priority list. The charge priority list that you assign to the eCheck item type can differ from the credit card item type. In this way, you can control whether particular charges can be paid by one payment method versus another. Be sure to specify the correct tender category (eCheck or credit card) on the item type so that it is available to select here.

Accept Self Service Payments

This is a display-only field that shows whether Accept Self Service Payments has been selected in the General Options setup. This means that web credit card payments are authorized for this business unit.

Accept Miscellaneous Purchases

This is a display-only field that shows whether Accept Miscellaneous Purchases has been selected in the General Options setup.

Electronic Payments

Default Address

Select to make the address fields on the Make a Payment - Specify Payment Details page available for input.

Default Telephone

Select to make the telephone field on the Make a Payment - Specify Payment Details page available for input.

Default Email Address

Select to make the email field on the Make a Payment - Specify Payment Details page available for input.

Display Browser Message

Select this check box:

- To display a browser message on the Make a Payment - Confirm Payment page when hosted payment is used.
- To display the Browser Requirements link on the Make a Payment - Confirm Payment page when hosted payment is used.

You define the browser requirements message and detail on the Payment Merchant page.

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

Enforce Daily Limit and **Daily Limit**

Select the Enforce Daily Limit check box to limit the number of self-service payments a student can make per day to the value that you enter in the Daily Limit field. For example, if you set up and institution set with both a credit card merchant ID and an electronic check merchant ID, and enter a daily limit of *4*, then a student can make any combination of eCheck and credit card transactions up to a maximum of four total transactions per day.

If a student exceeds the limit, the system prevents the student from making additional self-service payments until the following day.

Display Privacy Policy

Select to display the Privacy Policy link on the Make a Payment - Confirm Payment page if a school uses the hosted payment feature and on the Make

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a Payment - Specify Payment Details page if the school does not use the hosted payment feature.

The privacy policy is optional and user defined.

Privacy Policy

Click to access the Institution Set Privacy Policy page and define a privacy policy for your institution.

Make a Payment

Your selections here determine what students see in the Make a Payment self-service component. For instance, if you clear the Display Pending Financial Aid check box, then the student's anticipated aid will not be displayed anywhere in the Make a Payment self-service component.

SF Credit Card Merchant ID and **SF eCheck Merchant ID**

Select a credit card SF merchant ID, an eCheck SF merchant ID, or both for an institution set. This determines which payment type is supported for this institution set: credit card only, eCheck only, or both.

If you select a value in both the SF Credit Card Merchant ID and the SF eCheck Merchant ID fields, the Select Payment Method page prompts students to select one of two payment types from the drop-down list box—*Pay by Credit Card* or *Pay by Electronic Check*,—before they are permitted to enter self-service payment information. If you select a value in only one of these fields, then the system takes students directly to the Make a Payment - Specify Payment Details page because only one valid tender option is available for self-service payment.

Note. Depending on the charge priority rules assigned to the ePayment item type, the student may not be presented with all charges to pay—the student will be presented only those charges that are a part of the charge priority list that is associated with the ePayment credit card or eCheck item type.

Payment Merchant

The check boxes are selected or cleared by default depending on the setup on the SF Merchants page and are not available for edit on this page.

Note. If both credit card and eCheck are available as payment methods for an institution set, both payment methods must be either hosted or non-hosted. For example, if you define an institution set that allows credit card payment with hosted payment and eCheck with non-hosted payment, you receive an error message advising that SF merchants have conflicting payment merchant values.

You can, however, use Business Interlink for one payment method and Integration Broker for another.

Also, across features, you can use both hosted and non-hosted payment—for example, you can use hosted payment for Make a Payment setup and non-hosted for Miscellaneous Fees setup.

See lssf, Setting Up ePayment Processing.

Allocation Level

Use the allocation level to define how charges and payments are displayed on a self-service page.

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Allocation Level By Business Unit

This page displays all charges that the student incurred by business unit on the Make a Payment self-service component. Displaying charges in this manner forces the student to pay all or a portion of the charges by business unit. The Student Financials posting process invokes the appropriate charge priority and payment overall priority rules to the self-service payments.

What I Owe

Description	Outstanding Charges	Pending Payment Amount	Pending Financial Aid	Remaining Balance	Payment Amount
PS Comm College	900.00	0.00	0.00	900.00	
PS University	4,448.00	194.00	1,200.00	3,054.00	
Total	**5,348.00**	**194.00**	**1,200.00**	**3,954.00**	

pay all charges | zero out amounts | calculate total

Allocation Level By Business Unit page (1 of 2)

My Charges

PS Comm College

Item Description	Due Date	Item Term	Outstanding Charges
Tuition - Undergraduate - General Biology II	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - General Chemistry	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - Pract Acct Proc	08/28/2004	2004 Fall	300.00
Total			**900.00**

Currency used is US Dollar.

PS University

Item Description	Due Date	Item Term	Outstanding Charges
Parking Fines	05/15/2004	2004 Spring	35.00
Library Fines	multiple..	2004 Spring	22.50
Tuition	01/01/2005	2005 Spring	1,369.50
Single Room	01/15/2005	2005 Spring	2,350.00
Meal Plan-21	01/15/2005	2005 Spring	421.00
Subscription Fees	01/15/2005	2005 Spring	125.00
Parking Stickers	02/01/2005	2005 Spring	125.00
Total			**4,448.00**

Allocation Level By Business Unit page (2 of 2)

Allocation Level by Charge

This page displays each charge that the student incurred individually by business unit on the Make a Payment self-service component. Displaying charges in this manner permits the student to pay all or a portion of each charge. The Student Financials posting process bypasses the established charge priority and payment overall priority rules and uses the amounts that the student indicates during the self-service transaction. The resulting effect is that the student can choose which charges to pay, thus creating a scenario in which older, more pressing charges can be ignored while newer charges can be reduced.

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PS Comm College

Item Description	Due Date	Item Term	Outstanding Charges	Payment Amount
Tuition - Undergraduate - General Biology II	08/28/2004	2004 Fall	300.00	
Tuition - Undergraduate - General Chemistry	08/28/2004	2004 Fall	300.00	
Tuition - Undergraduate - Pract Acct Proc	08/28/2004	2004 Fall	300.00	
PSCCS Excess Payment			0.00	
Total			**900.00**	

pay charges | zero out amounts | calculate grand total

Currency used is US Dollar.

PS University

Item Description	Due Date	Item Term	Outstanding Charges	Payment Amount
Parking Fines	05/15/2004	2004 Spring	35.00	
Library Fines	multiple..	2004 Spring	22.50	
Tuition	01/01/2005	2005 Spring	1,369.50	
Single Room	01/15/2005	2005 Spring	2,350.00	
Meal Plan-21	01/15/2005	2005 Spring	421.00	
Subscription Fees	01/15/2005	2005 Spring	125.00	
Parking Stickers	02/01/2005	2005 Spring	125.00	
PSUNV Excess Payment			0.00	
Total			**4,448.00**	

pay charges | zero out amounts | calculate grand total

Allocation Level by Charge page (1 of 2)

Payment Summary

Description	Outstanding Charges	Pending Payment Amount	Pending Financial Aid	Remaining Balance	Payment Amount
PS Comm College	900.00	0.00	0.00	900.00	0.00
PS University	4,448.00	194.00	1,200.00	3,054.00	0.00
Total	**5,348.00**	**194.00**	**1,200.00**	**3,954.00**	**0.00**

pay all charges | zero out all amounts | calculate grand total

Currency used is US Dollar.

CANCEL | PREVIOUS | NEXT

Allocation Level by Charge page (2 of 2)

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Allocation Level by Term

This page displays all charges that the student incurred by term within each business unit on the Make a Payment self-service component. Displaying charges in this manner permits the student to pay all or a portion of a term's charges—these charges are aggregated by business unit whereby the student cannot pay each individual charge. The Student Financials posting process invokes the appropriate charge priority and payment overall priority rules to the self-service payments.

Note. For the Allocation Level by Term feature to work, you will need set Term, Payment Term First for Sort 1 of the Charge Sort for Payment Overall Priority attribute for applicable ePayment item types.

What I Owe

Description	Term	Outstanding Charges	Pending Financial Aid	Remaining Balance	Payment Amount
PS Comm College	2004 Fall	900.00	0.00	900.00	
PS University	2004 Spring	57.50	0.00	57.50	
PS University	2005 Spring	4,390.50	1,200.00	3,190.50	
Total		**5,348.00**	**1,200.00**	**4,148.00**	

pay all charges | zero out amounts | calculate total

Allocation Level by Term page (1 of 2)

My Charges

PS Comm College

Item Description	Due Date	Item Term	Outstanding Charges
Tuition - Undergraduate - General Biology II	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - General Chemistry	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - Pract Acct Proc	08/28/2004	2004 Fall	300.00
Total for 2004 Fall			**900.00**

Currency used is US Dollar.

PS University

Item Description	Due Date	Item Term	Outstanding Charges
Parking Fines	05/15/2004	2004 Spring	35.00
Library Fines	multiple..	2004 Spring	22.50
Total for 2004 Spring			**57.50**
Tuition	01/01/2005	2005 Spring	1,369.50
Single Room	01/15/2005	2005 Spring	2,350.00
Meal Plan-21	01/15/2005	2005 Spring	421.00
Subscription Fees	01/15/2005	2005 Spring	125.00
Parking Stickers	02/01/2005	2005 Spring	125.00
Total for 2005 Spring			**4,390.50**

Allocation Level by Term page (2 of 2)

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Allow Excess Payment Select to allow students to make ePayments in excess of their balance due.

Accept Admissions Deposit Select to accept payment for admissions deposits by credit card over the internet. The application center does not accept payment by eCheck.

Set the parameters for the real-time posting of credit card transactions.

Post Offline Authorization Select to post transactions in real time, even though you authorize the transactions through a batch process. This field is available only if you do not select the Credit Card Authorization option on the SF Merchants page.

Post Unprocessed Authorization Select to post credit card transactions that fail while performing real-time authorization due to a connection problem. If you cleared this check box, the system posts only transactions with fully processed authorizations.

Note. Consider the implications if transactions posted in real time fail authorization when processed at a later point in time (such as payment reversals and discharge of service indicators).

Reverse Declined Authorization Select to automatically reverse a posted transaction when a credit card transaction is declined. This option should always be selected if you choose to post transactions with payments authorized offline (see above).

Your next selections determine what students see in the Make a Payment self-service component. For instance, if you clear the Display Pending Financial Aid check box, then the student's anticipated aid will not be displayed anywhere in the Make a Payment self-service component.

Display Pending Financial Aid Select to display anticipated aid as a line item on the Make a Payment - Specify Payment Amount page in the What I Owe grid. With this check box selected, anticipated aid appears on the page as a line item only and does not reduce the remaining balance amount. Students are informed of any anticipated aid, but their total charges are not reduced by the anticipated aid.

If this check box is cleared, then the student's anticipated aid does not appear anywhere in the Make a Payment self-service component.

Include Pending Aid – Payments Select to use pending financial aid to reduce the remaining balance amounts on the Make a Payment - Specify Payment Amount page. This check box must be used in conjunction with the Display Pending Financial Aid check box for the remaining balance amount to be reduced by anticipated aid.

If this check box is selected, the student's total charges are reduced and the student is informed of any anticipated aid.

If Display Pending Financial Aid and this check box are both cleared, then the student's anticipated aid does not appear anywhere in the Make a Payment self-service component.

Display Pending Payments Select to display the student's pending payments on the Make a Payment - Payments page and the Make a Payment - Specify Payment Amount page.

If this check box is cleared, then the student's pending payments do not appear anywhere in the Make a Payment self-service component.

Include Pending Payments If this check box is selected, then the student's balance is reduced by the payment amount. This check box must be used in conjunction with the

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Display Pending Payments check box for the remaining balance amount to be reduced by any payments made.

If Display Pending Payments and this check box are both cleared, then the student's pending payments do not appear anywhere in the Make a Payment self-service component.

Miscellaneous Fees

Use these fields if your institution wants to set up separate merchant IDs for miscellaneous purchases as opposed to regular tuition payments.

SF Credit Card Merchant ID and SF eCheck Merchant ID

Select a credit card SF merchant ID, an eCheck SF merchant ID, or both for miscellaneous fees. This determines which payment type is supported for this institution set: credit card only, eCheck only, or both. If you select a value in both the SF Credit Card Merchant ID and SF eCheck Merchant ID fields, the Select Payment Method page prompts students to select one of two payment types from the drop-down list box—Pay by Credit Card or Pay by Electronic Check—before they are permitted to enter self-service payment information. If you select a value in only one field, the system takes students directly to the Make a Payment - Specify Payment Details page because only one valid tender option is available for self-service payment.

For miscellaneous purchases, the setup on the Purchase Items setup component (SSF_PUR_ITEM_TABLE) determines the items that will be presented for purchase. Because these are optional purchases, they do not exist until the student (or user) elects to purchase these items. Because these are paid for at the time of selection, charge priority rules do not affect miscellaneous purchases.

Payment Merchant

The check boxes are selected or cleared by default depending on the setup on the SF Merchants page and are not available for edit on this page.

Note. If both credit card and echeck are available as payment methods for an institution set, both payment methods must be either hosted or non-hosted. For example, if you define an institution set that allows credit card payment with hosted payment and eCheck with non-hosted payment, you receive an error message advising that SF merchants have conflicting payment merchant values.

You can, however, use Business Interlink for one payment method and Integration Broker for another. (For credit cards, Security Code is supported only by Integration Broker).

Also, across features, you can use both hosted and non-hosted payment—for example, you can use hosted payment for Make a Payment setup and non-hosted for Miscellaneous Fees setup.

See lssf, Setting Up ePayment Processing.

Defining Self-Service Business Units for Institution Sets

Access the Business Units page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Business Units).

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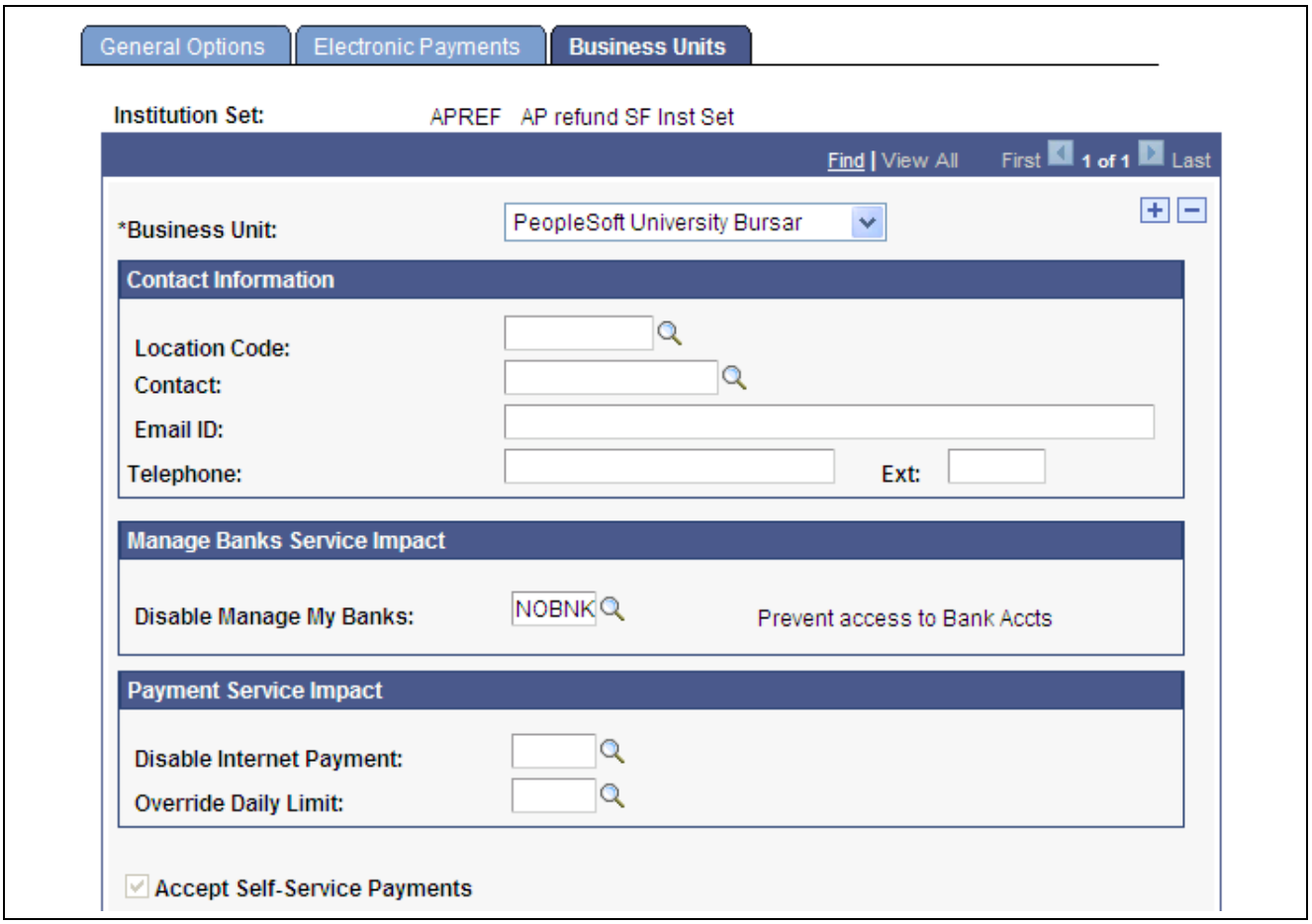

Business Units page (1 of 2)

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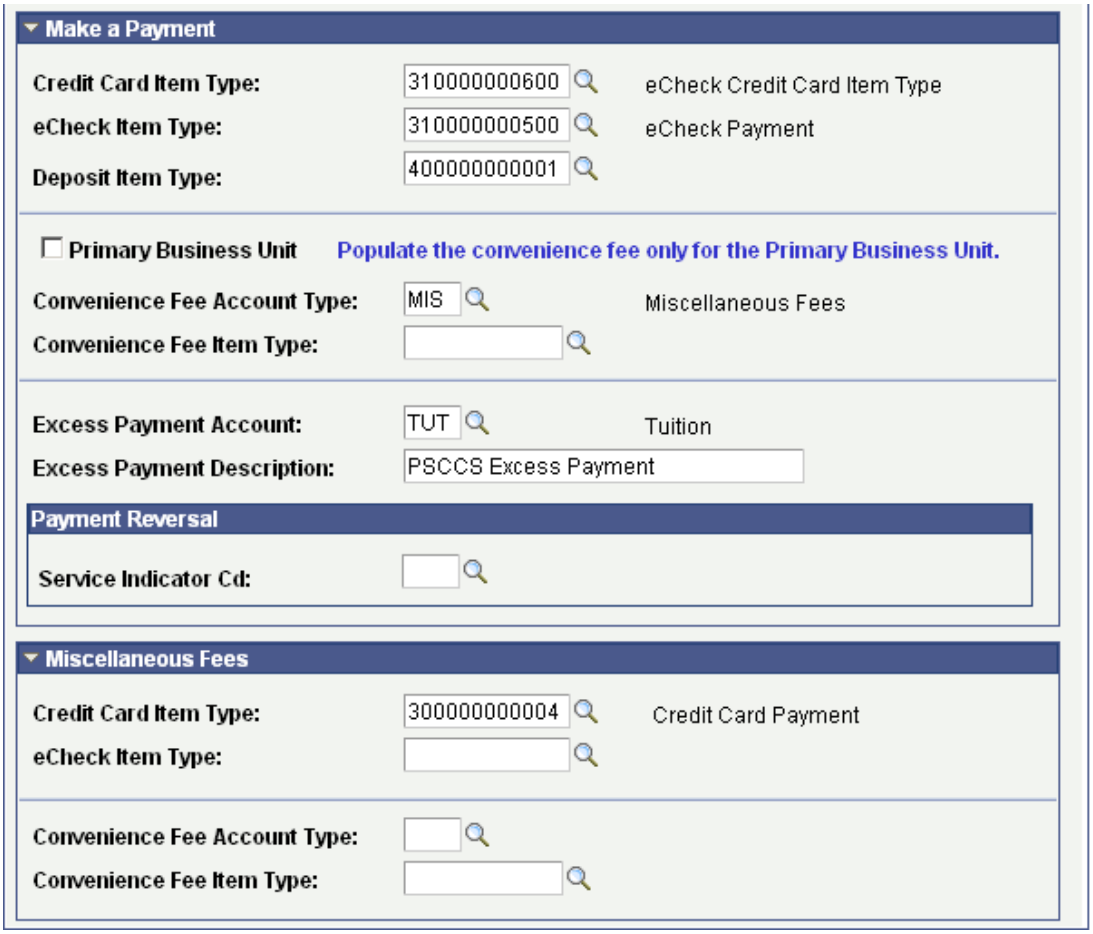

Business Units page (2 of 2)

Note. Most of the fields on the SF Institution Set - Business Units page are specific to each business unit in the institution set, not to the institution set as a whole. If you have multiple business units associated with the institution set, be sure to insert a row and enter the information on the SF Institution Set - Business Units page for each business unit. Also, if you have more than one business unit associated with your institution set, you must enter a priority ranking for each (see below). The exceptions to this are the service impact and service indicator codes, which are institution-set-specific, not business-unit-specific.

To control what charges the student can pay towards in self service, you must ensure that the item type contains the correct charge priority list. The charge priority list that you assign to the eCheck item type can differ from the credit card item type. In this way, you can control whether particular charges can be paid by one payment method versus another. Be sure to specify the correct tender category (eCheck or credit card) on the item type so that it is available to select here.

Business Unit Enter the business unit that you want to include in this institution set.

Contact Information

Location Code Select a location code to display a remittance address on the Account Summary and Total Due Charges pages.

Contact Select the ID of the individual assigned to be the contact person in the event of web credit card transaction problems.

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Email ID Enter the email address of the contact person.

Telephone Enter the telephone number of the contact person.

Ext (extension) Enter the telephone extension of the contact person (if applicable).

Manage Banks Service Impact

Use the Disable Manage My Banks service impact to remove student access to the Manage My Bank Accounts pages in Self Service. If a student has this service impact, the student cannot set up new bank accounts or edit existing bank account details. This service impact does not prevent direct deposit refunds from being distributed to existing bank accounts.

After you verify that the student cannot access the Manage My Bank Accounts component in Self Service, revoke the bank agreement if one exists.

Payment Service Impact

Disable Internet Payment Select the negative service impact code that the system uses to disable a customer's ability to pay on the internet using a credit card. If the student has this impact on his or her account, the student cannot access the Make a Payment page.

Override Daily Limit Select the positive service impact code that the system uses to enable customers to bypass the daily limit for credit card payments. If a student has this impact on his or her account, the student cannot make credit card payments in excess of the daily limit.

Accept Self-Service Payments This is a display-only field that shows whether Accept Self Service Payments has been selected in the General Options setup. This means that web credit-card payments are authorized for this business unit.

Make a Payment

Credit Card Item Type Enter the item type that the system uses for self-service credit card transactions entered for this institution set.

Note. The payment item type that you select must specify credit card as a tender type.

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eCheck Item Type Enter the item type that the system uses for self-service eCheck transactions entered for this institution set.

Note. The payment item type that you select must specify electronic check as a tender type.

See lssf, Completing Student Financials General Setup, Setting Up Item Types and Item Type Groups.

Deposit Item Type If you accept web credit card payments for admission deposits, select the item type that is defined for admission deposits.

Primary Business Unit Select to designate the business unit as the one to which the system assigns ePayment transaction surcharges.

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Note. You can designate only one business unit per institution set as the primary business unit.

Convenience Fee Account Type

If you charge a convenience fee on credit card transactions, select the account to which the system posts charges resulting from a credit card transaction convenience fee.

Note. If you charge a convenience fee, the payment item type used for credit card transactions must include the account type of your convenience fee item type on the account type page.

See lssf, Completing Student Financials General Setup, Setting Up Item Types and Item Type Groups.

Convenience Fee Item Type

If you charge a convenience fee on credit card transactions, select the item type that the system uses when posting charges resulting from a credit card transaction convenience fee.

Note. If you are charging a convenience fee, the item type specified here must be included in one of the Allowable Charges tree nodes in the charge priority list used by the credit-card payment item type. This charge priority list is specified on the item type miscellaneous page.

See lssf, Completing Student Financials General Setup, Setting Up Item Types and Item Type Groups.

Excess Payment Account

Select the account to which the system posts credit card payments in excess of customer balances. If it is different , this selection overrides the excess payment account that you select in the Posting Setup 1 page of the SF Business Unit component (BUSINESS_UNIT_SF).

Excess Payment Description

Enter the label that you want to display for excess payments. This description overrides the description of the item type for credit-card payment and appears on the Allocate Payment page in the Future Charges section.

Payment Reversal

Service Indicator CD

Select the negative service indicator code that the system attaches to student records when transaction authorizations fail and payments are reversed.

Miscellaneous Fees

This setup allows different payment item types and convenience fee item types to be used as opposed to the regular Make a Payment item types

Credit Card Item Type

Enter the item type that the system uses for self-service credit card transactions entered for this institution set for paying for miscellaneous purchases.

Note. The payment item type that you select must specify credit card as a tender type.

eCheck Item Type

Enter the item type that the system uses for self-service eCheck transactions entered for this institution set to pay for miscellaneous purchases.

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Note. The payment item type that you select must specify electronic check as a tender type.

See lssf, Completing Student Financials General Setup, Setting Up Item Types and Item Type Groups.

Convenience Fee Account Type

If you are charging a convenience fee on credit card transactions for miscellaneous purchases, select the account to which the system posts charges resulting from a credit-card transaction convenience fee.

Note. If you are charging a convenience fee, the payment item type used for credit card transactions must include the account type of your convenience fee item type on the account type page.

See lssf, Completing Student Financials General Setup, Setting Up Item Types and Item Type Groups.

Convenience Fee Item Type

If you are charging a convenience fee on credit card transactions, select the item type that the system uses when posting charges resulting from a credit card transaction convenience fee.

Note. If you are charging a convenience fee, the item type specified here must be included in one of the Allowable Charges tree nodes in the charge priority list used by the credit card payment item type. This charge priority list is specified on the item type miscellaneous page.

See lssf, Completing Student Financials General Setup, Setting Up Item Types and Item Type Groups.

Setting Up Self-Service Options

This section discusses how to define business unit labels.

Page Used to Set Up Self-Service Options

Page Name	Definition Name	Navigation	Usage
SF Self Service Options	SS_SF_OPTIONS	Set Up SACR, Common Definitions, Self Service, Student Financials, SF Self Service Options	Define business unit labels for self-service payment pages. The values that you enter here are used in the View By drop-down list boxes and in grids on self-service pages.

Defining Business Unit Labels

Access the SF Self Service Options page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Self Service Options).

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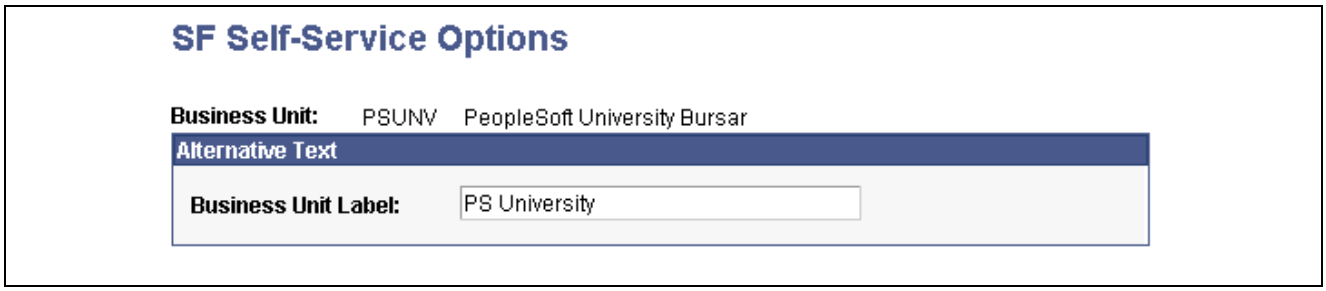

SF Self Service Options page

Business Unit Label Enter the label that appears on all self-service pages that reference the business unit: table headings, filters, column headings, and so on.

Setting Up Miscellaneous Fees

Miscellaneous fees are charges that are separate from tuition that can be selected and paid for in one transaction. Students can select and purchase items or services, for example, parking or a health plan, in Self Service. The user does not need to be a student (especially for nonterm-based fees).

This section discusses how to:

- Set up a purchase category.
- Set up purchase items.
- Enable self-service miscellaneous purchases.

Pages Used to Set Up Miscellaneous Fees

Page Name	Definition Name	Navigation	Usage
Purchase Category	SSF_PUR_CATEGORY	Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Category	Set up a purchase category.
Purchase Items	SSF_PUR_ITEM_TBL	Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Items	Set up fee structure for purchase of miscellaneous items.

Setting Up a Purchase Category

Access the Purchase Category page (Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Category).

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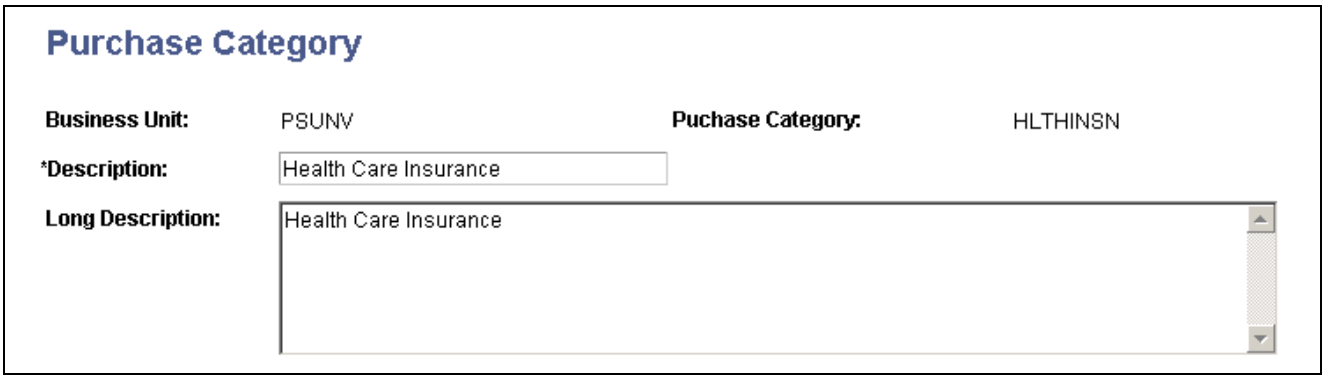
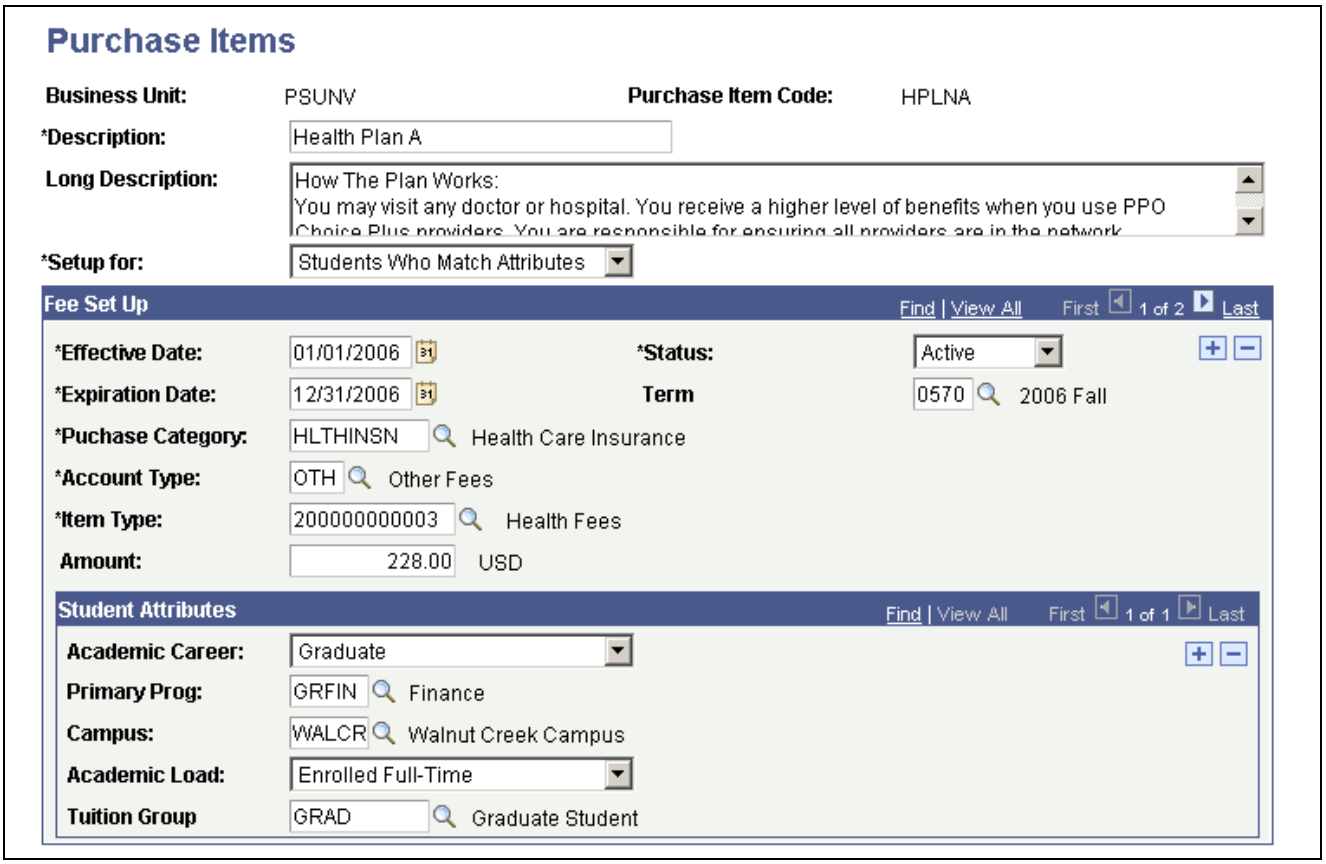


Purchase Category page

Setting Up Purchase Items

Access the Purchase Items page (Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Items).



Purchase Items page

Description Enter a description of the purchase item. This will appear in the self-service component for available items.

Long Description Enter a more detailed description of the purchase item. In the Purchase Miscellaneous Items self-service component (SSF_SS_MISC_PUR), the long description appears when you click the link of the available item.

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Setup for

Select from the following list of values to determine what population can view miscellaneous items for purchase on self service.

- *All Term Activated Students:* The term is available.
- *All Users:* The fee is set up for all users, regardless of student status. student attributes and student groups are not available.
- *Student Groups:* Any ID placed in a group will see this charge on self service.

  The item is set up only for members of a student group, for example, honors students, veterans, and so on.

  Items that are set up with this attribute appear only as available items for purchase for student IDs that have been added to the student group.
- Students Who Match Attributes: The student must have a record in STDNT_CAR_TERM. The Term field in level one is available. The Student Groups field is not available for entry. Fees that are set up with this attribute will appear only to students matching the attributes in the Student Attributes area.

Fee Setup

Effective Date

The start date. Prior to this date, the item is not eligible for selection in self service.

Status

Active or *Inactive.*

Expiration Date

The end date. The item is not available for selection using self service after this date.

Term

Appears only for Students Who Match Attributes and All Term Activated Student selections.

This limits the item to a specific term and is used in conjunction with the effective date and expiration date that do not fall into the start and end dates of the term. For fees that have overlapping effective and expiration date ranges, for example, supplemental health insurance, you can add multiple terms to cover the item for purchase.

Purchase Category

Select a purchase category.

Account Type

Use to classify the charge item type.

Item Type

Define an item type for the charge.

Amount

Enter the amount to be charged for the item.

Student Attributes

The Student Attributes group box does not appear if the institution selects *All Term Activated Students* or *All Users* in the Setup for field on this page.

If *Student Group* is selected in the Setup for field on this page, the Student Group field appears. Select a student group.

If *Students Who Match Attributes* is selected in the Setup for field on this page, select a value for each of the following fields:

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- Academic Career
- Primary Prog (primary program)
- Campus
- Academic Load
- Tuition Group

Enabling Self-Service Miscellaneous Purchases

To enable self-service miscellaneous purchases, select the Accept Miscellaneous Purchases check box on the Institution Set page. This check box controls whether the Accept Miscellaneous Purchases option appears in the other financial drop-down list box in Student Center and whether the link appears at the bottom of the Account Inquiry page.

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

See lsss, Setting Up Student Financials Self Service, Setting Up Institution Sets, Pages Used to Set Up Institution Sets.

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