

Oracle's PeopleSoft 8.9 MP1
Student Financials
Changes and Updates for CS
Bundle #12

November 2007

Changes and Updates for CS Bundle #5

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PeopleSoft Student Financials Documentation Updates for CS Bundle #12

Note. This document is an update to the *PeopleSoft Enterprise Student Financials 8.9 PeopleBook*. It describes the Product Update ID # 687640 that was posted to Customer Connection in November 2007. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document provides information related to updates and fixes delivered with CS Bundle #12. Specifically, it provides information about:

- Changes to posting parameters
- Changes to setting up Australian loan defaults
- Changes to tuition calculation equations

See Also

PeopleSoft Enterprise 8.9 Student Financial PeopleBook, “Completing Student Financials General Setup,” Setting Up Business Units

PeopleSoft Enterprise 8.9 Student Financials PeopleBook, “Setting Up and Using Australian Loans,” Setting Up Australian Loan Defaults

PeopleSoft Enterprise 8.9 Application Fundamentals PeopleBook, “Working with Equation Engine,” Defining Application Prompts

PeopleSoft Student Financials 8.9 PeopleBook, “Setting Up Tuition Controls, Criteria, Equations and Waivers,” Using Equation Engine to Define Tuition Calculation Equations

PeopleSoft Student Financials 8.9 PeopleBook, “Setting Up Tuition Controls, Criteria, Equations and Waivers,” Using Equation Engine to Define Tuition Calculation Equations

PeopleSoft Student Financials 8.9 PeopleBook, “Setting Up Tuition Controls, Criteria, Equations and Waivers,” Establishing Tuition Calculation Controls

Changes to Posting Parameters

This section discusses changes related to the Posting Setup page.

Page Used to Define Posting Parameters

Page Name	Object Name	Navigation	Usage
Posting Setup	BUS_UNIT_TBL_SF14	Set Up SACR, Product Related, Student Financials, SF Business Unit, Posting Setup	Posting Setup

General 1 | General 2 | **Posting Setup** | Commit Options | Collections | Refund Setup | Refund Approval | ▶

Business Unit: PSUNV PeopleSoft University Bursar

QUICK_POST_TBL Purge Control

Origin ID: 00010 Housing Office

Group Type: Q Quick Post Transaction

Credit Processing

Item Tree Name: ITEM_SECURITY

Default Term Control: Latest Enrollment Term Move Initial Payment

Excess Payment Account: MIS Miscellaneous Fees Move Initial Waiver

Excess Waiver Account: Move Initial Financial Aid

Excess FA Account: TUT Tuition Disbursement Date Item

Reference Number Posting Usage

Ref Debit Item Flag

Ref Item Payment Flag Ref Excess Payment Flag

[Posting Setup page](#)

On the Posting Setup page, two of the values for the **Default Term Control** fields in the Credit Processing group box have been updated.

Latest Enrollment Term Select if you want the default term to be based on the maximum term from STDNT_CAR_TERM where the eligible to enroll flag is on. If that does not return a term, then the default term will be based on the term value defined in the SF Term Default setup.

Most Current Enrollment Term Select if you want the default term based on the term from STDNT_CAR_TERM with a begin date of less than equal to the current date. If that does not return a term, then the default term will be based on the term from STDNT_CAR_TERM where the end date is greater than or equal to the current date. If this does not return a term, then the default term will be based on the term value defined in the SF Term Default setup.

Changes to Setting Up Australian Loan Defaults

This section discusses the updates to the explanatory information for the:

- HECS Fee Codes page
- HECS Band Fees page

Page Used to Set Up HECS Fee Codes

Page Name	Object Name	Navigation	Usage
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Page Name	Object Name	Navigation	Usage
HECS Fee Codes	SFF_HECS_CD_TABLE	Set Up SACR, Product Related, Student Financials, Australian Defaults, HECS Band Fees, HECS Fee Codes	Define the fee code for a band fee.

HECS Fee Codes | HECS Band Fees

SetID: PSANZ HECS Fee Code: HECSUG

*Status:

*Description:

Long Description:

[HECS Fees Codes page](#)

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

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

Page Used to Set Up HECS Band Fees

Page Name	Object Name	Navigation	Usage
HECS Band Fees	SSF_HECS_FEE_TABLE	Set Up SACR, Product Related, Student Financials, Australian Defaults, HECS Band Fees	Define the band fees for HECS eligible students. These band fees can be Cohort Year specific.

HECS Fee Codes | **HECS Band Fees**

SetID: PSANZ **Copy Band Fee** HECS Fee Code: HECSUG HECS - HELP Band Fees

HECS Band Fee Defaults Find | View All First 1 of 3 Last

*Term: 0589 Semester 2 - Spring 2007 + -

*Account Type: HEC HECS Account

*Item Type: 100000000000 HECS Australian

*Due Date Code: STD Standard

*Adjustment Code: STD Standard

Charge for Wait Listed Class

HECS Band Fees for Cohort Find | View All First 1 of 4 Last

Cohort Year: 2006 Cohort Year 2006 + -

*HECS Band ID	Band Charge	Currency	+ -
Band 1	4899.00	USD	+ -
Band 2	6979.00	USD	+ -
Band 3	8170.00	USD	+ -
National Priority	3001.00	USD	+ -

[HECS Band Fees page](#)

The **Copy Band Fee** button is added to the page.

Copy Band Fee Click this button to copy a band fee from one term to another. If cohort values are associated with the band fee on the source term, these will be copied to the target term.

The field descriptions for this page are:

- Term** Enter the term to which the band fee is applicable to.
- Account Type** Enter the account type that will reflect on the customer account for students subject to the band fee.
- Item Type** Enter an item type applicable to the Student Contribution Amount charged.
- Due Date Code** Enter a due date code (calendar) to define when the fee is due and payable.
- Adjustment Code** Select the adjustment code (calendar) that governs this fee. This code determines the refund amount for students who drop classes.
- Charge for Wait Listed Class** Select this option to charge the band fee for students who are on a waiting list for a class.

Cohort Year	Cohort Year is an attribute of the Student Program for Institutions using installation settings for Australia and inherited as the default value on the student enrolment record. The cohort value on the enrolment will determine the HECS Band Fee that is applicable. The Cohort Year can be blank.
HECS Band ID	The HECS Band ID is the unique identifier assigned on the Course Offering that will determine the student contribution amounts applicable to an enrolment in the course. Traditionally, Band ID values of 1 through 4 were maintained to acknowledge a single contribution amount published by the government that was applicable to the HECS band associated with the Discipline Group Code for the Unit for Study. The current legislative regime allows for a maximum student contribution amount applicable to the funding cluster associated with the Unit of Study subject to transitional arrangements in place at any given time for particular cohorts of students. The Band ID associated with the course still controls the student contribution amounts charged, but any number of values may be configured to accommodate the policy and legislative requirements of the Institution.
Band Charge	The charge (Commonwealth Contribution Amount) for each Band ID and Cohort Year combination.

Changes to Tuition Calculation Equations

This section discusses the changes to:

- Defining application prompts
- Viewing equation information
- Global variables
- The Display Error/Warning Controls page

Defining Application Prompts

To allow for the equations that are only using global variables from the STDNT_CAR_TERM record and to eliminate the need to repeatedly call the Equation Engine, the following equation application prompts have been introduced:

- Stdnt Fin Tuit Select Limited (student financials tuition select limited)
- Stdnt Fin Tuit Amount Limited (student financials tuition amount limited)

If only global variables are being used from STDNT_CAR_TERM, using one of the new prompts may improve tuition calculation performance. This table will assist you in determining the Equation Application prompt to use depending on the global variable.

Student Financials Global Variables	Stdnt FinTuition Amount Eqtns	Stdnt Fin Tuition Select Eqtns	Stdnt Fin Tuition Amount Limited	Stdnt Fin Tuit Select Limited
INSTITUTION	X	X	X	X
BUSINESS UNIT	X	X	X	X
ACAD_CAREER (academic career)	X	X	X	X
STRM (term)	X	X	X	X
EMPLID	X	X	X	X
STDNT_CAR_NBR (student career number)	X	X	X	X
BILLING_CAREER	X	X	X	X
A_AMOUNT	X	X	X	X
A_SELECT (yes/no flag)	X	X	X	X
SESSION_CODE	X	X		
CLASS_NBR (class number)	X	X		
CRSE_ID (course id)	X	X		
TRANS_DATE (enrl_drop_dt)	X	X		
ENRL_ACTN_RSN_LAST (enrolment action reason last)	X	X		
TRANS_TIME (last drop term stamp)	X	X		

Page Used to Define Tuition Calculation Equations

Page Name	Object Name	Navigation	Usage
Equation Tbl	EQUATION_TBL	Set Up SACR, Common Definitions, Equation Engine, Equation Engine, Equation Tbl	Create a short and long description for an equation and determine the application prompt.

Equation Tbl
Equation Dtl

Equation Name: SFTDUGRDAMT
Compile
Test
[Print](#)

Find
First
1 of 1
Last

Effective Date: 01/01/1900
Status as of Effective Date: Active

Short Description: SFUGRDAMT

Description: SF UGRD Pay Amount

Compile Status: Not Yet Compiled

Application Prompts
Customize | Find | View All
First
1 of 1
Last

Application Prompt	
1	Stdnt Fin Tuit Amount Limited

[Equation Tbl page \(SFTDUGRDAMT\)](#)

This equation uses the Stdnt Fin Tuit Amount Limited application prompt ID. The equation looks at a student’s career number, determines whether the student is an undergraduate, and then assigns a monetary amount.

Changes to Global Variables

These global variable labels have been updated:

Current label	New label
ENRL_DROP_DT	TRANS_DATE
LAST_DROP_TM_STMP	TRANS_TIME

Selecting Errors and Warnings

A new option is available on the Display Error/Warning Controls page that prevents the logging of equation engine messages. When the **Display in Log File** check box is cleared, the equation statements will not display in the Tuition Calc Log file.

Page Used to Select Errors and Warnings

Page Name	Object Name	Navigation	Usage
Display Error/Warning Controls	DISP_ERR__CNTL	Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Calculation Controls, Display Error/Warning Controls	Select errors and warnings for tuition calculation.

Tuition Calculation Controls Refund Calculation Controls **Display Error/Warning Controls**

SetID: PSUNV

Customize Find View All First 1-13 of 13 Last						
*Term		Include Status of Warning	Include Status of Message	Display in Log File		
0545	2005 Summer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0539	Summer Session - 2005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0518	2004 Spring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0505	2003 Fall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0450	2001 Fall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0440	2001 Summer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0430	2001 Spring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0410	2000 Fall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0390	2000 Spring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0370	1999 Fall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0330	1998 Fall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0310	1998 Spring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
0290	1997 Fall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Display Error/Warning Controls page

If the equation contains the equation keyword Message or the equation produced an error, the message will be written to the Tuition Calc log file.

Note. The equation keyword Message may affect performance and should be used primarily in your test environment to verify the results of the equation.