Setting Up Tuition Controls, Criteria, Equations, and Waivers

Understanding Tuition Controls, Criteria, Equations, and Waivers

Controls, criteria, and waivers determine when the system calculates tuition and for whom. They define how much money the system returns if a student drops a class or withdraws. They determine whether an administrative user, regardless of security, can run tuition calculation after on line term withdrawal. They also establish for whom tuition should be waived and for what reason. Equation Engine replaces the equation processor previously used in Campus Solutions applications. Equation Engine performs complicated calculations that can help you select students for inclusion in a group or determine a fee for a unique situation.

Creating Billing and Due Date Calendars

To set up billing and due date calendars, use the Billing and Due Calendars component (DUE_DATE_PANEL).

Billing and due date calendars are associated with tuition calculation and are used to determine the percentage of specific fees due to be paid by a particular time. Because a due date calendar is required for the setup of fees, you must define at least one billing and due date calendar for your institution. You can also define additional billing and due date calendars as needed to meet the requirements of your business processes.

When creating your billing and due date calendar, you can specify that the payment of a fee is due in full at a particular date, or you can create a payment schedule. For example, you can define a billing and due date calendar that indicates that your application fee is due in full at the time that an application is filed and create another billing and due date calendar for installment payments for your tuition fees. You can also design the system so that a due date for a fee is designated at the time that you create a bill or post a charge.

Page Used to Create Billing and Due Date Calendars

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing and Due Calendars</td>
<td>DUE_DATE_TABLE</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Billing and Due Calendars</td>
<td>Define billing and due date calendars.</td>
</tr>
</tbody>
</table>
Defining Billing and Due Date Calendars

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

**Image: Billing and Due Calendars page**

This example illustrates the fields and controls on the Billing and Due Calendars page. You can find definitions for the fields and controls later on this page.

### Billing and Due Calendars

<table>
<thead>
<tr>
<th>Set ID:</th>
<th>FBUNIV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date Code:</td>
<td>STD</td>
</tr>
<tr>
<td>Description:</td>
<td>Standard</td>
</tr>
<tr>
<td>Pivot Date:</td>
<td>Term Start Date</td>
</tr>
</tbody>
</table>

**Pivot Date**

Select a pivot date for this calendar. Student Financials uses the pivot date as the starting place to calculate due dates or billing dates. The system counts the billing dates and due dates—either back in time or forward in time—from the pivot date that you select.

**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 requires a substantial programming effort.

Select from:

- **Admit Term Start Date**: Select to use as the pivot date the first day of the term that the student is admitted. This option pertains to application fee processing only.

- **Application Date**: Select to use as the pivot date the date that the application is filed. This option pertains to application fee processing only.

- **Class Start Date**: Select to use as the pivot date the first day of the class.

- **Session Start Date**: Select to use as the pivot date the first day of the session.
Term start date: select to use as the pivot date the first day of the term.

For ITEM_SF installments, you can use only pivot dates that are available at the level that the fee is calculated. If the term fee is calculated by:

- term, use Term Start Date.
- session, use Term Start Date or Session Start Date.
- class, use Term Start Date, Session Start Date, or Class Start Date.

If the tuition calculation process encounters a billing and due date calendar that does not use the appropriate pivot date, this message appears: Unable to calculate the Pivot Start Date from the Billing and Due Calendar.

For example, if a fee is charged by term, you must not use Session Start Date or Class Start Date to calculate the billing or due date. For fees charged by session, you must not use Class Start Date.

**Note:** For ITEM_SF installments, it is not recommended to use Class Start Date as a pivot date because this increases the variability of the different class start dates and their corresponding billing and due dates. Also, because class start dates are derived only from the class table, OEE and dynamic dating will not be supported.

<table>
<thead>
<tr>
<th>Copy Billing and Due Calendar</th>
<th>Click to copy this billing and due calendar to a new term or session.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term</td>
<td>Enter the term for this billing and due calendar.</td>
</tr>
<tr>
<td>Session</td>
<td>If you are defining a billing and due calendar for a session within a term, or you want to use the session start date as the pivot date, specify the session.</td>
</tr>
<tr>
<td>From Day and To Day</td>
<td>Enter the first and last day that you assess fees. Express the number of days before the pivot date as a negative number, and the number of days after the pivot date as a positive number.</td>
</tr>
<tr>
<td>Due % (due percent)</td>
<td>Define the percentage of the fee that's due for the respective assessment period.</td>
</tr>
<tr>
<td>Due Date Calc (due date calculation)</td>
<td>Use this field to determine how the system calculates the due date for a given fee assessment period. Select from:</td>
</tr>
</tbody>
</table>

Days from Pivot Date: Select to calculate the due date based on the pivot date.
If tuition calc is creating installments, any adjustments are processed by first trying to match the adjustment due date to the due date of the original charge. If an adjustment with an unmatched due date is posted, it is applied to the oldest due date with a lower line sequence number first. This also applies to adjustments posted with NULL due dates.

*Days from Run Date:* Select to calculate the due date based on the day that you assessed fees.

Do not select this option when creating tuition calc adjustments to ensure that any tuition calc adjustments are applied appropriately to the original installment due date(s).

*No Date Calculated:* Select to disable the calculation of a due date.

**Note:** Do not select *Days from Run Date* or *No Date Calculated* when using the Third Party Contract-Track Charges by Due Dates functionality.

See [Setting Up Third-Party Contracts](#).

### Days

Enter the number of days from the pivot date or run date that the fees are due. Enter a negative number to indicate days before the respective date; enter a positive number to indicate days after the respective date. If you select *No Date Calculated* in the Due Date Calc field, the Days field becomes unavailable.

### Billing Date Calc (billing date calculation)

Use this field to determine how the system calculates the billing date for a given fee assessment period. Select from:

*Days from Due Date:* Select to calculate the billing date based on the calculated due date.

*Days from Pivot Date:* Select to calculate the billing date based on the pivot date.

*Days from Run Date:* Select to calculate the billing date based on the day that you assessed fees.

*No Date Calculated:* Select to disable the calculation of a billing date.

**Note:** Do not select *Days from Run Date* when using the Third Party Contract Track Charges by Due Dates functionality.

See [Setting Up Third-Party Contracts](#).

### Days

Enter the number of days from the due date, pivot date, or run date that the system produces a bill. Enter a negative number to indicate days before the respective date; enter a positive number to indicate days after the respective date. If you select
Setting Up Adjustment Calendars

To set up adjustment calendars, use the Adjustment Calendars component (ADJ_TERM_PANEL).

This section provides an overview of adjustment calendars and discusses:

• Defining Adjustment Calendars
• Defining Administrative Fees for Adjustment Periods
• Calculating the Term Fee by Term and Adjusting by Term Scenarios

Understanding Adjustment Calendars

Adjustment calendars determine the refund schedules that you apply to the members of a tuition group. These calendars govern how the system adjusts term and class level fees when a student withdraws or drops a class. The system uses the number of days that a term or class has been in session or the class attendance percentage to determine the percentage of refund due. The system calculates these figures using date and time stamps located in the STDNT_ENRL table. State government, an agency, the federal government, or your institution can mandate refund schedules. The pro rata refund is applied to first-time students who withdraw. Federal regulations require you to use the refund table that is best for the student.

The logic for term fee calculations and adjustments for each student is:

• The student enrollment record contains all the add and drop transactions. When a student adds or drops a class, the Tuition Calculation process records various fields from the enrolment records in a temporary table. The temporary table references the add and drop dates as the transaction date.

• When a student drops a class, the Tuition Calculation process calculates the drop costs by comparing the amount before the drop to the amount after the drop. Tuition Calculation then applies the appropriate adjustment calendar percentage.

Related Links
"Understanding Class Enrollment Processing (PeopleSoft Campus Solutions 9.0: Student Records)"

Pages Used to Set Up Adjustment Calendars

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment Calendars</td>
<td>ADJ_TERM_TABLE</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Adjustment Calendars</td>
<td>Define adjustment calendars.</td>
</tr>
<tr>
<td>Administrative Fee Setup</td>
<td>ADMIN_FEE_SP</td>
<td>Click the Administrative Fee Setup link on the Adjustment Calendars page.</td>
<td>Define administrative fee for adjustment periods.</td>
</tr>
</tbody>
</table>
Defining Adjustment Calendars

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

**Image: Adjustment Calendars page**

This example illustrates the fields and controls on the Adjustment Calendars page. You can find definitions for the fields and controls later on this page.

### Adjustment Calendars

<table>
<thead>
<tr>
<th>Description</th>
<th>Enter a description to identify this adjustment calendar.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment Option</td>
<td>Select the adjustment option for this adjustment calendar. Values are:</td>
</tr>
<tr>
<td></td>
<td>By Census Date: Select to adjust fees based on the census date. Use only for Higher Education Contribution Scheme (HECS) calculation. This adjustment option is not available for term fees.</td>
</tr>
<tr>
<td></td>
<td>By Class Length % (by class length percentage): Select to adjust fees based on the number of days that have passed out of the total number of class days scheduled. For example, if a class is scheduled to run for 13 weeks, and a student drops the class at the end of the second week, the student would have attended slightly over 15 percent of the class length.</td>
</tr>
<tr>
<td></td>
<td>By Class Meeting % (by class meeting percentage): Select to adjust fees based on the number of class meetings attended out of the total number of scheduled class meetings.</td>
</tr>
</tbody>
</table>

**Note:** Most types of financial aid have specific fee adjustment requirements. Consult your financial aid staff to determine adjustment calendar requirements.
By Class Meetings: Select to adjust fees based on the number of class meetings attended regardless of the total number of meetings scheduled.

By Class Start Date: Select to adjust fees based on the number of days that have passed from the class start date.

By Session Start Date: Select to adjust fees based on the number of days that have passed from the first day of the session.

By Term Start Date: Select to adjust fees based on the number of days that have passed from the first day of the term.

Adjust Reason (adjustment reason): Select the adjustment reason code. You might adjust fees differently depending on the reason that the student drops or withdraws. For example, you might give a full refund to a student who has to drop for reasons beyond his control. The adjust reason is a short explanation of the difference.

Note: If you want to select an adjustment reason for a term withdrawal, you must first select the Term Withdrawal check box.

Term Withdrawal: Select if this adjustment code is to be used for term withdrawal. Do not select this check box if the adjust reason is for dropped classes.

Copy Adjustment Calendar: Click to copy an adjustment calendar from one term to another.

Set Default: Select to designate an adjust reason as the default reason for both term withdrawal and dropping a class. Both term withdrawal and class drop must have one adjustment calendar defined as the default.

Term and Session: Enter the appropriate term and session information for each adjust reason.

Day From and To: If you select the adjustment options By Class Start Date, By Term Start Date, or By Session Start Date, enter the beginning (Day From) and ending point (Day To) of the time period. For both of these fields, express the number of days before the start date defined in the Adjustment Option field as a negative number.

For example, if you want a student to receive a full refund from any time before the start of a term to the day before the start of a term, enter –9999 in the From Day field and –1 in the To Day field.

Percent From and To: If you select the adjustment options By Class Length % or By Class Meeting %, enter a beginning (Percent From) and ending point (Percent To) of the range. Percent values cannot be expressed as negative numbers.
For example, if you want students to receive a full refund if they drop any time before attending at least 10 percent of the class, enter 0% in the Percent From field and 9.999% in the Percent To field.

**Meeting From and Meeting To**

If you select the adjustment option *By Class Meetings*, enter a beginning (Meeting From) and ending (Meeting To) class session.

For example, if you want students to receive a full refund if they drop any time before attending the third class session, enter 0 in the Meeting From field and 2 in the Meeting To field.

**Refund Percent**

Enter the percent of fees charged that you want the student to receive as a refund.

**Administrative Fee Setup**

Click to define any administrative fees that are associated with the adjustment period.

**Note:** Administrative fees for withdrawal can be defined for each refund range row. You can set up an administrative fee for cancellation only on the first row and only if the refund percent is 100 percent.
Defining Administrative Fees for Adjustment Periods

Access the Administrative Fee Setup page (click the Administrative Fee Setup link on the Adjustment Calendars page).

**Image: Administrative Fee Setup page**

This example illustrates the fields and controls on the Administrative Fee Setup page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Adjustment Calendars</th>
<th>Administrative Fee Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date Code:</td>
<td><strong>STD</strong></td>
</tr>
<tr>
<td><strong>Withdrawal</strong></td>
<td>Standard</td>
</tr>
<tr>
<td>Currency:</td>
<td><strong>USD</strong></td>
</tr>
<tr>
<td>Flat Fee:</td>
<td>25.00</td>
</tr>
<tr>
<td>Percentage:</td>
<td></td>
</tr>
<tr>
<td>Maximum Amount:</td>
<td>100.00</td>
</tr>
<tr>
<td>Account Type:</td>
<td>MIS - Miscellaneous Fees</td>
</tr>
<tr>
<td>Item Type:</td>
<td>120000000002</td>
</tr>
</tbody>
</table>

| Cancellation         |                           |
| Flat Fee:            | 25.00                     |
| Account Type:        | MIS - Miscellaneous Fees  |
| Item Type:           | 120000000002              |

Due Date Code

Select the due date code (billing and due calendar) that you want to use for the administrative fee.

**Withdrawal Group Box**

**Flat Fee**

If you want to charge a student a specific amount for withdrawing from school or for canceling enrollment in classes, enter the amount in the Flat Fee fields. This option can be used alone or in conjunction with a percentage fee.

**Percentage**

If you want to charge students a percentage of their tuition and fees when they withdraw from school, enter that percentage in this field. This option can be used alone or in conjunction with a flat fee. This option applies to withdrawal only.
Maximum Amount
If you want to put a limit on the total administrative fees that can be charged to students who withdraw from school, enter a maximum amount in this field. This option applies to withdrawal only.

Account Type
Select an account type for the administrative fee.

Item Type
Select the item type that you have set up for administrative fee charges.

Cancellation
Flat Fee
If you want to charge a student a specific amount for withdrawing from school or for canceling enrollment in classes, enter the amount in the Flat Fee fields. This option can be used alone or in conjunction with a percentage fee.

Account Type
Select an account type for the administrative fee.

Item Type
Select the item type that you have set up for administrative fee charges.

Related Links
Setting Up Account Types
Setting Up Item Types and Item Type Groups

Calculating the Term Fee by Term and Adjusting by Term Scenarios
The following scenarios describe how the system calculates the term fees after a student initially enrolls in four classes and then:

- Drops one class.
- Adds an additional class.
- Drops two classes on the same day, with the same reason.
- Drops two classes on the same day, with two different reasons.

The term fee is assessed through an equation and is charged by term and adjusted by term. Refer to the section Using Equation Engine to Define Tuition Calculation Equations to see the sample equation, SFTDTFTRMTRM (Charge by Term, Adjust by Term).

Scenario 1: On January 1, 2007 the student enrolled in four classes at 100 per unit. Each class is three billing units; therefore, the total billing units equals 12 and the total amount equals 1200.00 USD, as shown in the following examples:

<table>
<thead>
<tr>
<th>Class_nbr</th>
<th>Stdnt_enrl_status</th>
<th>Enrl_add_dt</th>
<th>Trans_date</th>
<th>Enrol_actn_rsn_last</th>
</tr>
</thead>
<tbody>
<tr>
<td>1001</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
The following table lists the transaction in the Tuition Calculation temporary table after initial enrollment:

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Amount</th>
<th>Difference</th>
<th>Drop Date</th>
<th>Reason</th>
<th>Refund %</th>
<th>Drop Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2007</td>
<td>1200.00</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>/AN</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Student Balance is 1200.00

Scenario 2: On January 1, 2007 the student initially enrolled in four classes. Then on January 2, 2007 the student drops one class:

<table>
<thead>
<tr>
<th>Class_nbr</th>
<th>Stdnt_enrl_status</th>
<th>Enrl_add_dt</th>
<th>Trans_date</th>
<th>Enrol_actn_rsn_last</th>
</tr>
</thead>
<tbody>
<tr>
<td>1001</td>
<td>D</td>
<td>01/01/2007</td>
<td>01/02/2007</td>
<td>SDRP</td>
</tr>
<tr>
<td>1002</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1003</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1004</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

The following table lists the transactions in the Tuition Calculation temporary table after initial enrollment and dropping one class:

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Amount</th>
<th>Difference</th>
<th>Drop Date</th>
<th>Reason</th>
<th>Refund %</th>
<th>Drop Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2007</td>
<td>1200.00</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>01/02/2007</td>
<td>900.00</td>
<td>300.00</td>
<td>01/02/2007</td>
<td>SDRP</td>
<td>80%</td>
<td>300* (100% — 80%) = 60</td>
</tr>
</tbody>
</table>

Student balance: 900.00 + 60.00 = 960.00

Scenario 3: On January 3, 2007 the student initially enrolled in four classes. On January 2, 2007 the student dropped a class and then on January 3, 2007 the student adds an additional class:

<table>
<thead>
<tr>
<th>Class_nbr</th>
<th>Stdnt_enrl_status</th>
<th>Enrl_add_dt</th>
<th>Trans_date</th>
<th>Enrol_actn_rsn_last</th>
</tr>
</thead>
<tbody>
<tr>
<td>1011</td>
<td>D</td>
<td>01/01/2007</td>
<td>01/02/2007</td>
<td>SDRP</td>
</tr>
<tr>
<td>1002</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
The following table lists the transactions in the Tuition Calculation temporary table after initial enrollment and dropping one class and adding one class:

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Amount</th>
<th>Difference</th>
<th>Drop Date</th>
<th>Reason</th>
<th>Refund %</th>
<th>Drop Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/0/2007</td>
<td>1200.00</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>01/02/2007</td>
<td>900.00</td>
<td>300.00</td>
<td>01/02/2007</td>
<td>SDRP</td>
<td>80%</td>
<td>300* (100% — 80%) = 60</td>
</tr>
<tr>
<td>01/03/2007</td>
<td>1200.00</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Note: In this example, the drop cost of 1200.00 on January 3, 2007 is not calculated on an added class.

Student balance: 1200.00 + 60.00 = 1260

Scenario 4; On January 1, 2007 the student initially enrolled in four classes. Then on January 2, 2007 the student drops two classes with the same reason, on the same day.

<table>
<thead>
<tr>
<th>Class_nbr</th>
<th>Stdt_enrl_status</th>
<th>Enrl_add_dt</th>
<th>Trans_date</th>
<th>Enrol_actn_ran_last</th>
</tr>
</thead>
<tbody>
<tr>
<td>1011</td>
<td>D</td>
<td>01/01/2007</td>
<td>01/02/2007</td>
<td>SDRP</td>
</tr>
<tr>
<td>1002</td>
<td>D</td>
<td>01/01/2007</td>
<td>01/02/2007</td>
<td>SDRP</td>
</tr>
<tr>
<td>1003</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1004</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

The following table lists the transactions in the Tuition Calculation temporary table after the initial enrollment and dropping of two classes with the same reason, on the same day.

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Amount</th>
<th>Difference</th>
<th>Drop Date</th>
<th>Reason</th>
<th>Refund %</th>
<th>Drop Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/0/2007</td>
<td>1200.00</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>01/02/2007</td>
<td>900.00</td>
<td>600.00</td>
<td>01/02/2007</td>
<td>SDRP</td>
<td>80%</td>
<td>600 (100% — 80%) = 120.00</td>
</tr>
</tbody>
</table>

Student balance: 600.00 + 120.00 = 720.00
Scenario 5: On January 1, 2007 the student initially enrolled in four classes. Then on January 2, 2007 the student drops two classes with two different reasons:

<table>
<thead>
<tr>
<th>Class_nbr</th>
<th>Stdnt_enrl_status</th>
<th>Enrl_add_dt</th>
<th>Trans_date</th>
<th>Enrol_actn_ran_last</th>
</tr>
</thead>
<tbody>
<tr>
<td>1011</td>
<td>D</td>
<td>01/01/2007</td>
<td>01/02/2007</td>
<td>SDRP</td>
</tr>
<tr>
<td>1002</td>
<td>D</td>
<td>01/01/2007</td>
<td>01/02/2007</td>
<td>CANC</td>
</tr>
<tr>
<td>1003</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1004</td>
<td>E</td>
<td>01/01/2007</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

The following table lists the transactions in the Tuition Calculation temporary table after the initial enrollment and dropping of two classes with two different reasons, on the same day.

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Amount</th>
<th>Difference</th>
<th>Drop Date</th>
<th>Reason</th>
<th>Refund %</th>
<th>Drop Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/0/2007</td>
<td>1200.00</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>01/02/2007</td>
<td>900.00*</td>
<td>300.00</td>
<td>01/02/2007</td>
<td>CANC</td>
<td>90%</td>
<td>300* (100% — 90%) = 30.00</td>
</tr>
<tr>
<td>01/02/2007</td>
<td>600.00</td>
<td>300.00</td>
<td>01/02/2007</td>
<td>SDRP</td>
<td>80%</td>
<td>$600 (100% — 80%) = 60.00</td>
</tr>
</tbody>
</table>

Student Balance: 600.00 + 30.00 + 60.00 = 690.00

When a student drops two classes with two different reasons on the same day, the temporary table is inserted alphabetically by reason and each class is calculated separately. The first amount is calculated by only noting that one class has been canceled. The second amount is calculated by using the second class that has been dropped by the student.

If the adjustment calendar is by session start date, the session code is taken into account similarly to the reason.

During withdrawal processing, the student's enrollment record, for enrolled classes, will have the drop date equal the last attendance date. Therefore, the transaction date will be the last attendance date.

---

**Establishing Tuition Calculation Controls**

Bundle 37. Documentation-only update: Clarified description of term and transaction wash.

To set up tuition calculation controls, use the Tuition Calculation Controls component (CALC_CNTROL_PANEL).

Tuition calculation controls determine the academic careers that are eligible for tuition and fee calculation each term.

This section discusses:
• Specifying Tuition Calculation Parameters
• Specifying Effective Terms for ITEM_SF Installments
• Establishing Restrictions on Automatic Tuition Calculation
• Selecting Errors and Warnings

Pages Used to Establish Tuition Calculation Controls

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition Calculation Controls</td>
<td>CALC_CNTL_TABLE</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Calculation Controls</td>
<td>Specify tuition calculation parameters for academic careers by term.</td>
</tr>
<tr>
<td>Installment Controls</td>
<td>SSF_CALC_CNTL_INST</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Calculation Controls, Installment Controls</td>
<td>Specify the effective term for which ITEM_SF installments can be created.</td>
</tr>
<tr>
<td>Refund Calculation Controls</td>
<td>CALC_ON_REFUND_CTL</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Calculation Controls, Refund Calculation Controls</td>
<td>Establish restrictions on automatic tuition calculation.</td>
</tr>
<tr>
<td>Display Error/Warning Controls</td>
<td>DISP_ERR_CNTL</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Calculation Controls, Display Error/Warning Controls</td>
<td>Select errors and warnings for tuition calculation.</td>
</tr>
</tbody>
</table>
Specifying Tuition Calculation Parameters

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

Image: Tuition Calculation Controls page

This example illustrates the fields and controls on the Tuition Calculation Controls page. You can find definitions for the fields and controls later on this page.

The wash functionality contains three levels: session, term, and transaction, and are mutually exclusive.

Note: You must establish tuition controls for each active academic career for each term.

**Academic Career**

Select the academic career for your tuition calculation controls.

**Term Controls**

**Term**

Select the term to which these controls apply.

When you add a new term, a message appears: *Warning — Term has not been setup for Installment Control.* To set up the term so that ITEM_SF installments can be applied, go to the Installment Controls tab.

**Term Wash Period**

The term wash period indicates the number of days that a student can drop and add classes of equal value (wash) without penalty. This is not the same as a drop/add period in which students are allowed to make any changes. The term wash period typically extends beyond the normal drop/add period to accommodate students who must make changes to their enrollment.

For example: a student enrolls in Chemistry 101 and determines, after two weeks in class, that he or she is too advanced for the
introductory level class. If the term wash period is at least 14 days, the student can switch to Chemistry 201 without penalty.

Term wash is not based on class or class cost, but is based on billing units of the class.

**Note:** The dropped and added classes do not need to match exactly as long as the total amount of tuition and related fees is equal. For example, a student can drop one four-credit course and replace it with two two-credit courses as long as the total tuition and fee charges do not change.

**Transaction Wash Period**

Enter a number of days for a transaction wash period. The transaction wash period allows students a period of time in which to complete a *wash* transaction. That is, the student does not need to drop and add the wash classes at the same time. Rather, as long as the replacement class or classes are added within the transaction wash period, no penalty is incurred. If the drop and add take place *outside* both the term wash and transaction wash periods, the student is charged the prorated amount of the dropped class and the full amount of the added class.

**Auto Calculate Tuition** *(automatically calculate tuition)*

Select to automatically calculate tuition whenever you inquire on a student's account. This feature enables you to see the most up-to-date tuition information without having to run a separate tuition calculation.

**Auto Calculate Self Service**

Select to automatically calculate tuition for a particular term in self service. If you select the check box, a student using self service can see the most up-to-date tuition information without you having to run a separate tuition calculation.

In self service, the system calculates tuition when a student accesses the Account Inquiry or the Make a Payment component. 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).

**Note:** This option impacts only self service, in contrast to the Auto Calculate Tuition option that impacts only the administrative module. You can choose to enable automatic tuition calculation for self service, administrative module, or both.

The check box is cleared by default.
**Note:** In addition to selecting this check box, you must also select automatic self service tuition calculation elsewhere in the system, for tuition calculation to be invoked in self service. You must select the check box here for automatic self service tuition calculation to have effect for a particular term.

See "Defining Basic Institution Set Parameters (*PeopleSoft Campus Solutions 9.0: Self Service*)".

**Auto Calculate Waivers**
(automatically calculate waivers)

Select to automatically calculate student waivers whenever tuition is calculated. If you select this option, Student Financials calculates a student's tuition first, and then automatically applies all tuition waivers against the student's final tuition amount. If you do not select this option, the system does not calculate or post tuition waivers, so you must calculate and post waivers in background processing.

See "Posting Withdrawals and Cancellations for Terms (*PeopleSoft Campus Solutions 9.0: Student Records*)"

**Auto Calculate Term Withdrawal**
(automatically calculate term withdrawal)

When this check box is selected, an administrative user can run tuition calculation immediately after the successful completion of an online term withdrawal, regardless of the user’s security.

**Session Controls**

**Session**

Enter a session if you want your tuition calculation controls to apply to specific sessions within the term. If you leave this field blank, the controls apply to all sessions in the term.

**Session Wash Period**

If you choose to apply tuition calculation controls by the session, you must enter a session wash period value. The session wash period works the same as a term wash period.

---

Bundle 37. Added sentence

Session wash is not based on class or class cost, but is based on billing units of the class.
Specifying Effective Terms for ITEM_SF Installments

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

Image: Installment Controls page

This example illustrates the fields and controls on the Installment Controls page. You can find definitions for the fields and controls later on this page.

Use this page to specify the effective terms for which ITEM_SF installments can be created on the Tuition Calculation Controls page.

Term

Select the term for which an installment can be applied.

To add another term, click the + button. To delete, click the – button. You can select only terms that are defined on the Tuition Calculation Controls page and only if tuition has not been posted for the term. If you add a term that has not been defined on the Tuition Calculation Controls page, an error message appears. You will not be able to delete a term from the Installment Controls page if tuition has been posted for the term.

When you add an effective term, this creates a unique ITEM_SF for each installment, and waivers are automatically applied proportionally according to the due date of the fee.

You can create future ITEM_SF installments, but not adjust installments (charges or waivers) that have already been billed. However, you can override these at the tuition group level.

Note: For ANZ and HECS, ITEM_SF installment is controlled through setID (tableset ID). If setID is used as the set control value, then the Installment Controls page is not available for any business unit that references an institution where the DEST, HECS, Centrelink, TAC, or NZQA check boxes are selected—even if the Create Tuition Installments check box is selected on the SF Installation 2 page.

Related Links
Setting Up Installation Parameters and Keywords
Setting Up Tuition Groups
Establishing Restrictions on Automatic Tuition Calculation

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

**Image: Refund Calculation Controls page**

This example illustrates the fields and controls on the Refund Calculation Controls page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Term</th>
<th>Enter the term for which the refund calculation control applies.</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Calculation on Batch Refund</td>
<td>Select if you do not want the system to automatically calculate tuition when batch refund processing is run.</td>
</tr>
</tbody>
</table>
Selecting Errors and Warnings

Access the Display Error/Warning Controls page (Set Up SACR, Product Related, Student Financials, Tuition and Fees, Tuition Calculation Controls, Display Error/Warning Controls).

Image: Display Error/Warning Controls page

This example illustrates the fields and controls on the Display Error/Warning Controls page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Term</th>
<th>Include Status of Warning</th>
<th>Include Status of Message</th>
<th>Display in Log File</th>
</tr>
</thead>
<tbody>
<tr>
<td>0620, 2008 Summer</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>0621, 2008 Fall</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0605, 2008 Summer</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0600, 2008 Spring</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0601, 2007 Fall</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0585, 2007 Summer</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0580, 2007 Spring</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0575, 2006 Summer</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0570, 2006 Spring</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0530, Summer Session - 2005</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>0518, 2004 Spring</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0505, 2003 Fall</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0450, 2001 Fall</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0440, 2001 Summer</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0430, 2001 Spring</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0410, 2000 Fall</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0390, 2000 Spring</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0370, 1999 Fall</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0330, 1998 Fall</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0310, 1998 Spring</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
<tr>
<td>0290, 1997 Fall</td>
<td>✓</td>
<td>✓</td>
<td>+</td>
</tr>
</tbody>
</table>

The default setting is ON to display warnings and messages. If you do not have a row for the term with these controls cleared, you will continue to receive errors and warnings. Insert a row for every term in which you want to clear warnings and messages.

If an equation contains the equation keyword Message, or the equation produces an error, the message is 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.

Term

Select the term for the error and warning controls that you are defining.
Include Status of Warning

Select to have warning messages appear in CALC_ERROR. If you do not select this check box, warnings do not appear.

Include Status of Message

Select to have messages appear in CALC_ERROR. If you do not select this check box, messages do not appear.

Display in Log File

Select during your installation process when you want to review log file information. This feature is typically disabled after installation and testing has been completed.

---

Defining Variables for Criteria and Equations

To set up variables for criteria and equations, use the Equation Variables component (STDNT_EQUTN_VARS).

This section provides an overview of equation variables and discusses:

- **Defining Character Variables**
- **Defining Numeric Variables**
- **Defining Yes/No Flags**

Understanding Equation Variables

Equation variables are user-defined variables that you can use to classify students when no standard system values are available. For example, you might need to calculate a fee for students involved in summer internship programs. You could define one or more variables to use to identify the students and calculate the appropriate fees.

Pages Used to Define Variables for Criteria and Equations

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Char Variables (character variables)</td>
<td>STDNT_EQUTIN_CHAR</td>
<td>Student Financials, Tuition and Fees, Equation Variables, Char Variables</td>
<td>Define character variables.</td>
</tr>
<tr>
<td>Num Variables (numeric variables)</td>
<td>STDNT_EQUTN_NUM</td>
<td>Student Financials, Tuition and Fees, Equation Variables, Num Variables</td>
<td>Define numeric variables.</td>
</tr>
<tr>
<td>Y/N Flags (yes/no flags)</td>
<td>STDNT_EQUTN_FLAG</td>
<td>Student Financials, Tuition and Fees, Equation Variables, Y/N Flags</td>
<td>Define yes/no variables.</td>
</tr>
</tbody>
</table>
Defining Character Variables

Access the Char Variables page (Student Financials, Tuition and Fees, Equation Variables, Char Variables).

Image: Char Variables page

This example illustrates the fields and controls on the Char Variables page. You can find definitions for the fields and controls later on this page.

Term

Select the term for which you want the variables to apply.

Var Char1 (variable characters 1) through Var Char10 (variable characters 10)

You can attach up to 10 character variables to the student, using the Var Char1 through Var Char10 fields. Save the page, and the system links the character variables that you specified to the student. The character variables no longer apply when the term that you selected ends.
Defining Numeric Variables

Access the Num Variables page (Student Financials, Tuition and Fees, Equation Variables, Num Variables).

Image: Num Variables page

This example illustrates the fields and controls on the Num Variables page. You can find definitions for the fields and controls later on this page.

Term

Select the term for which you want the variables to apply.

Var Num1 (variable number 1) through Var Num10 (variable number 10)

Attach up to 10 numeric variables to the student, using these fields. Save the page, and the system links the variables that you specified to the student. The numeric variables no longer apply when the term that you selected ends.
Defining Yes/No Flags

Access the Y/N Flags page (Student Financials, Tuition and Fees, Equation Variables, Y/N Flags).

Image: Y/N Flags page

This example illustrates the fields and controls on the Y/N Flags page. You can find definitions for the fields and controls later on this page.

Term
Select the term for which you want the variables to apply.

User Variable Y/N Flag #1 (user variable yes/no flag number 1) through User Variable Y/N Flag #10 (user variable yes/no flag number 10)
You can select up to 10 Y/N flags per student, using the User Variable Y/N Flag #1 through User Variable Y/N Flag #10 check boxes. Save the page, and the system links the variables that you specified to the student.

Establishing Criteria for Tuition Groups and Fee Triggers

To set up criteria for tuition groups and fee triggers, use the Criteria component (SEL_CRITERIA_PANEL).

This section provides an overview of tuition group and fee trigger criteria and discusses:

- Defining Criteria Codes and Criteria Types
- Defining Criteria Details

Understanding Tuition Group and Fee Trigger Criteria

Criteria are essentially questions that can be answered yes or no. In PeopleSoft Student Financials, use criteria to compare one or more variable values to a student's academic situation to determine whether an action should be triggered (for example, applying a waiver to fees), or in which tuition group the student should be included.
The Criteria component is a flexible means of identifying and classifying students. Criteria can be as simple as a single variable (for example, is the student a sophomore) or extremely complex involving multiple variables. Whenever you create a criteria definition, test it thoroughly to make sure it produces the exact results that you expect.

Trigger criteria and tuition group criteria cannot be used interchangeably. You can, however, create one of each using the same detail setup.

Pages Used to Establish Criteria for Tuition Groups and Fee Triggers

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>SEL_CRITERIA_TABLE</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Criteria</td>
<td>Define criteria codes and criteria types.</td>
</tr>
<tr>
<td>Criteria Details</td>
<td>SEL_CRITER_TABLE</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Criteria, Criteria Details</td>
<td>Define criteria details.</td>
</tr>
</tbody>
</table>

Defining Criteria Codes and Criteria Types

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

Image: Criteria page

This example illustrates the fields and controls on the Criteria page. You can find definitions for the fields and controls later on this page.

Criteria Type

Select one of two criteria types. The two types cannot be used interchangeably. Select from:

*Trigger Criteria:* Select to define a criterion that triggers an event.

*Tuition Group Criteria:* Select to define a criterion that links a student to a tuition group.
Defining Criteria Details

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

Image: Criteria Details page

This example illustrates the fields and controls on the Criteria Details page. You can find definitions for the fields and controls later on this page.

**Description**
Select a variable related to a student's characteristics for a particular term.

**Note:** Student Financials provides system variables that cover most needs. In addition, 30 user-defined variables are available to use. Using these user-defined variables is more difficult because you must know the definition of each variable position.

**How Specified**

**Selected Detail Values**
Select to match the variable with a specific value.

**Selected Tree Nodes**
Select to match the variable using any value within a tree node. When you select this option, the fields in the Tree Information group box become available.

**TableSet, Tree Name, and Level Name**
Select the tableset, tree name, and a level name on the tree if the tree has strictly enforced levels. After specifying this information, enter a node or nodes to assist in specifying the student group.

**Operator**
Define the function that the system performs against the value.
### Relational Operators

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;</td>
<td>Less than</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than or equal to</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Not equal to</td>
</tr>
<tr>
<td>BLK (blank)</td>
<td>The field value is blank</td>
</tr>
<tr>
<td>BTW (between)</td>
<td>The field value is between A and B</td>
</tr>
<tr>
<td>NBL (not blank)</td>
<td>The field value is not blank</td>
</tr>
</tbody>
</table>

### Value/Node

If you select Selected Detail Values in the How Specified group box, enter an explicit variable value. The system edits it against a prompt table if one exists, or the system edits it for valid dates, numbers, and string lengths.

If you chose Selected Tree Nodes in the How Specified group box, specify a tree node in the Node field.

A tree node is a collection of values that is aggregated under a single node. It is a quick way to specify numerous values. A tree must have the same criteria as its detail value.

### Related Links

- Defining Variables for Criteria and Equations

### Using Equation Engine to Define Tuition Calculation Equations

The Equation Engine is a powerful tool that enables you to develop a variety of formulas. In Student Financials, equations are used to identify a student’s enrollment status, calculate and assign fees, and calculate tuition. This section provides an overview of global variables and discusses:

- Viewing Delivered Equations
- Viewing Equation Information
- Using Equation Engine in Student Financials Tuition Calculation
- Using Student Financials Undergraduate Selection Equation
Related Links
"Preparing to Write Equations (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"

Understanding Global Variables

The following SF global variables are now available to calculate: adjustments, course fees, course list fees, and class fees. The new global variables use fields from the Tuition Calculation temporary table, which originates from the STDNT_ENRL_ or CLASS_TBL.

The SF global variables are:

- A_amount
- A_select (yes/no flag)
- Acad_career (academic career)
- Billing_career
- Business_unit
- Class_nbr
- Crse_id (course id)
- Enrol_actn rsn_last (enrollment action reason last)
- Emplid
- Institution
- Session_code
- Stdnt_car_nbr (Student Career Number)
- STRM (Term)
- Trans_date
- Trans_time

Page Used to Define Tuition Calculation Equations

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equation Editor</td>
<td>EQUATION_EDITOR</td>
<td>Set Up SACR, Common Definitions, Equation Engine, Equation Editor</td>
<td>View delivered equations.</td>
</tr>
</tbody>
</table>
Viewing Delivered Equations

Access the Equation Editor page (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

**Image: Equation Editor page**

This example illustrates the fields and controls on the Equation Editor page. You can find definitions for the fields and controls later on this page.

**Equation Editor**

Enter any information you have and click Search. Leave fields blank for a list of all equations.

<table>
<thead>
<tr>
<th>Find an Existing Value</th>
<th>Add a New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Equation Id Auth Class:</strong> PUBLIC</td>
<td></td>
</tr>
<tr>
<td><strong>Equation Name:</strong> begins with <strong>SF</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Description:</strong> begins with ****</td>
<td></td>
</tr>
<tr>
<td><strong>Include History</strong></td>
<td><strong>Correct History</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Search</th>
<th>Clear</th>
<th>Basic Search</th>
<th>Save Search Criteria</th>
</tr>
</thead>
</table>

**Search Results**

<table>
<thead>
<tr>
<th>Equation Name</th>
<th>Description</th>
<th>Data Type Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFPFSPL</td>
<td>Pmp Sls Pmt Plan Contract Sel</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFPFSPLPLPC</td>
<td>Pmp Sls Pmt Plan Contract Sel</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDBILLUNIT</td>
<td>Billing Units</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDCASSNBR</td>
<td>Charge by Class Number</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDCCLSSEL</td>
<td>Class Select</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDCLSTRM</td>
<td>TF Charge by Class Adj by Tm</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDCLSWVR</td>
<td>Class Waiver</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDCOURSEID</td>
<td>Charge by Course ID</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDCSTDFYE</td>
<td>Case Study Fees</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDMDLABRT</td>
<td>Medical School Laboratory Fees</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDMDSTTUIT</td>
<td>Medical School Tuition</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDMDSPECRT</td>
<td>Medical Specialty</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDMOTESTSC</td>
<td>Medical School Test Scores</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDRSRCHFEE</td>
<td>Research Project Fees</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDTFSESTLS</td>
<td>TF Charge by Sess Adj by Class</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDTFSESTRM</td>
<td>TF Chrg by Sess Adj by Tm/Sess</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDTFTRMCLS</td>
<td>TF Charge by Term Adj by Class</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDTFTRMSES</td>
<td>TF Charge by Term Adj by Sess</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDTFTRMTRM</td>
<td>TF Charge by Term Adj by Term</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDUGRAD</td>
<td>Undergraduate</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDUGRDNT</td>
<td>SF UGRD Pay Amount</td>
<td>Demonstration Data</td>
</tr>
<tr>
<td>SFTDUGRDSEL</td>
<td>SF UGRD Select</td>
<td>Demonstration Data</td>
</tr>
</tbody>
</table>

You can view any equation listed on this page.
Viewing Equation Information

Access the SFTDTFTRMTRM equation on the Equation Editor page (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

**Image: Equation Editor example page (1 of 4)**

This example illustrates the fields and controls on the Equation Editor example page (1 of 4). You can find definitions for the fields and controls later on this page.
Image: Equation Editor example page (2 of 4)

This example illustrates the fields and controls on the Equation Editor example page (2 of 4). You can find definitions for the fields and controls later on this page.
### Image: Equation Editor example page (31 of 4)

This example illustrates the fields and controls on the Equation Editor example page (31 of 4). You can find definitions for the fields and controls later on this page.

```plaintext
48
49
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78
```

<table>
<thead>
<tr>
<th>Field Level</th>
<th>Field Name</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table</td>
<td>STDNT_CAR_TERM</td>
<td>String</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>LAST_DATE_ATTENDED</td>
<td>Global Variable</td>
<td>ENRL_DROP_DT</td>
</tr>
<tr>
<td>Table</td>
<td>STDNT_CAR_TERM</td>
<td>Field</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>LAST_DATE_ATTENDED</td>
<td>Global Variable</td>
<td>ENRL_DROP_DT</td>
</tr>
<tr>
<td>Table</td>
<td>STDNT_ENRL</td>
<td>Field</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>ENRL_DROP_DT</td>
<td>Global Variable</td>
<td>ENRL_DROP_DT</td>
</tr>
<tr>
<td>Table</td>
<td>STDNT_ENRL</td>
<td>Field</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>ENRL_DROP_DT</td>
<td>Global Variable</td>
<td>ENRL_DROP_DT</td>
</tr>
<tr>
<td>Table</td>
<td>STDNT_CAR_TERM</td>
<td>Field</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>WITHDRAW_REASON</td>
<td>Global Variable</td>
<td>ENRL_ACTN_RSN_LAST</td>
</tr>
</tbody>
</table>
```
This example illustrates the fields and controls on the Equation Editor example page (4 of 4). You can find definitions for the fields and controls later on this page.

This sample equation calculates the term fee by term, adjust by term. To determine the enrolled classes on a specific date, tuition calculation looks at the temporary table and, for each row, the equation is called and it compares the global variables from the temporary table to the student's enrollment. Refer to Understanding the Adjustment Calendar section for logic for the term fee and adjustment calculation for each student.

**Related Links**

"Preparing to Write Equations (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"
Using Equation Engine in Student Financials Tuition Calculation

Access the SFTDUGRDAMT equation on the Equation Editor page.

**Image: Equation Editor page (SFTDUGRDAMT)**

This example illustrates the fields and controls on the Equation Editor page (SFTDUGRDAMT). You can find definitions for the fields and controls later on this page.

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.
Using Student Financials Undergraduate Selection Equation

Access the SFTDUGRDSEL equation on the Equation Editor page (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

Image: Equation Editor page (SFTDUGRDSEL)

This example illustrates the fields and controls on the Equation Editor page (SFTDUGRDSEL). You can find definitions for the fields and controls later on this page.

This equation selects students based on their undergraduate status.

Defining Waivers and Waiver Groups

To set up waivers and waiver groups, use the Waivers component (WAIVER_PANEL) and the Waiver Groups component (WAIVER_GROUP_PANEL).
Waivers provide a convenient, consistent, and easily maintainable way of waiving or reducing tuition or fees for students who meet specific criteria. Waiver groups enable you to attach one or more waivers directly to class, course, and course list fees.

This section discusses:

- **Defining Waivers**
- **Defining Waiver Groups**

### Pages Used to Define Waivers and Waiver Groups

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waivers</td>
<td>WAIVER_TABLE</td>
<td>Set Up SACR, Product Related, Student Financials, Tuition and Fees, Waivers</td>
<td>Define waivers.</td>
</tr>
<tr>
<td>Waiver Groups</td>
<td>WAIVER_GROUP_TABLE</td>
<td>Set Up SACR, Product Related, Student Financials, Course and Class Fees, Waiver Groups</td>
<td>Define waiver groups.</td>
</tr>
</tbody>
</table>
Defining Waivers

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

Image: Waivers page

This example illustrates the fields and controls on the Waivers page. You can find definitions for the fields and controls later on this page.

Enable Student Override

Select to allow the default values in this waiver to be manually overridden. When you select this check box, it indicates that:

- This waiver code can be used in the Assign Student Waiver page and Mass Assign Student Waivers page.
- The waiver calculation process uses the values in the Assign Student Waiver table to override the waiver code values.

See Assigning Student Waivers.

The check box is deselected by default.

Note: Oracle recommends that you select this check box for all waivers.
Setting Up Tuition Controls, Criteria, Equations, and Waivers

Chapter __

If the check box is selected and you deselect it, you receive an error message if rows exist in the Assign Student Waiver table (does not apply to previous rows).

If the check box is deselected and you select it, you receive an error message if the waiver code is used in a tuition group.

Waiver Type

Select a Waiver Type:

Net: This option refers to the remaining balance to be paid and is associated with a Waiver Offset or Waive Percentage value. The Tuition Calculation process uses only the Net waiver type when it calculates term fees and course/class fees.

Gross: This option refers to the original amount to be paid. This option is selected by default.

Criteria

Select the criteria to use to determine the student's eligibility for a waiver. If the criteria option is selected as:

• Use Criteria or Use Equation, the Tuition Calculation process uses the selected criteria to check the student's eligibility for the waiver.

• No Criteria, you must manually verify the student's eligibility.

Note: The No Criteria option becomes available only if you select Enable Student Override.

Waiver Offset

Enter an amount the students potentially pay themselves. For example, you might waive all tuition fees for employees, but want them to pay at least 100 USD. Enter 100 in this field, and the system reduces the calculated waiver by 100 USD.

Note: Waiver Offset cannot be used in conjunction with the Waive Percentage, Amount/Unit, or Flat Amount option. You can use Waiver Offset with the Maximum Amount option to limit the total amount of the waiver. Also, if the waiver is attached to a tuition group, the Item Type Group field must be populated.

Use Excess Account

Select to move any excess waiver amounts to the account defined for excesses.

Waive Percentage

If only a percentage of a fee is to be waived, enter that percentage in this field.

When using ITEM_SF installments, the value you enter in this field represents the percentage of the fee that is waived for each ITEM_SF installment. For example, if you create six ITEM_SF installments of 500 USD each and you set the waiver percentage
Setting Up Tuition Controls, Criteria, Equations, and Waivers

to 10%, then each ITEM_SF installment will be reduced by 50 USD.

**Item Type Group**
Select an item type group if you want the option of attaching the waiver to a tuition group. When a waiver is attached to a tuition group, an item type group is necessary to limit which fees are affected. If the waiver is attached to a term fee, class, course, or course list fee, the program does not consider the item type group because the waiver is attached at a more specific level.

**Note:** The Item Type Group field is available only if Waiver Percentage or Waiver Offset is selected as the method of calculating the waiver.

**Amount/Unit**
If the waiver is based on the amount of units in a student's course load, enter the per unit amount.

ITEM_SF installments do not support Amount/Unit. If you use this field for ITEM_SF installments, the following message appears in review calculation: *Amt per Unit Waivers are not supported for Tuition Installments*. However, fees will still be calculated and posted.

**Flat Amount**
You can waive a flat amount for students who meet the criteria. If you select this option, do not complete the Waive Percentage and Waiver Offset fields.

When using ITEM_SF installments, the value you enter in this field represents the amount that is waived for each ITEM_SF installment. For example, if you create six ITEM_SF installments and you set the waiver flat amount to 120 USD, then each ITEM_SF installment can be reduced by 120 USD.

**Prorate Dropped Units**
Select to allow the proration of fees for dropped classes or term withdrawals. The check box is deselected by default. This option is for term fee waivers only.

You can select the check box only if you have entered a value in the Amount/Unit field.

To allow waiver proration, you must select Track Class Pricing in the Term Fees page. The FEE_CLASS_PRICE table is used to determine the class refund percent.

**Note:** This field is ignored if the class falls within the Term Wash Period.

To illustrate how this option works, consider this scenario. A student is enrolled in six units (two classes, each class is three billing units). The term fee is 200 per unit. A waiver is set for 50 per unit. The tuition amounts to 1200 USD and a waiver of 300 USD is applied. The balance amounts to 900 USD. Then the student drops one class. The refund is 80%. During the Tuition
The drop cost is calculated at 120 and then added to the amount of the term fee: $120 + 600 = 720. If the Prorate Dropped Units field is selected on the waiver, the class billable units is calculated as the billable unit multiplied by ($1 - (Refund Rate / 100))

Note: When you select Prorate Dropped Units, you will be unable to modify this field.

Add 0.60 to 3 (units enrolled in): $0.60 + 3 = 3.60 total billable units. The amount of waiver with the prorated dropped units is: $3.60 \times 50 = 180$. The waiver is deducted from the tuition: $720 - 180 = 540$, which is the total student balance.

Note:

Adjust Until Date

Define the last day that a dropped class can be included in the calculation of the amount/unit portion of a waiver.

This date is used to determine the total number of billable units.

If the class drop date falls later than Adjust Until Date, then the class billable units are added to the total number of billable units. However, if the class drop date falls later than Adjust Until Date, and you select Prorate Dropped Units, then the Amt/Unit waiver will include an amount for all units and not just the non-refunded units.

If this field is blank, dropped classes are not included in the total number of billable units.

The total number of billable units is used in calculating the value for Amount/Unit.

To illustrate how this option works, consider this scenario. A student is enrolled in six units (two classes, each class is three billing units). The term fee is 200 per unit. A waiver is set for 50 per unit. The tuition amounts to 1200 USD and a waiver of 300 USD is applied. The balance amounts to 900 USD. Then the student drops one class. The refund is 80%. During the Tuition Calculation process, the drop cost is calculated at 120 and then added to the amount of the term fee: $120 + 600 = 720$. The date used in the Adjust Until Date field determines if all billing units are used to calculate the waiver or just the enrolled units.

The Tuition Calculation process compares the drop date to the Adjust Until Date field. In this example, if the drop date falls later than the Adjust Until Date, the waiver is based on all units: $6 \times 50 = 300$. If the drop date falls earlier or on the same date as
the Adjust Until Date, the waiver is based on just the enrolled units: $3 \times 50 = 150$.

**Maximum Amount**

Enter the maximum amount that can be waived relative to the fees per term, session, or class.

**W aime Tax**

Select to control whether the waiver adjusts taxes that are associated with a charge. Selecting this option does not increase the amount of the waiver, but distributes it proportionately across the charge and tax. When you select this option, the Tax Waiver Account Type and Tax Waiver Item Type fields become available.

**Increase Waiver for Tax**

Select to add the amount of the tax to the waiver. When selected, this option can cause the total waiver to exceed the maximum amount limits.

**Tax Waiver Account Type**

Enter an account type for the waived tax. The default value is the same as for the waiver account type, but you can override it.

**Tax Waiver Item Type**

Enter an item type for the waived tax. The default value is the same as for the waiver item type, but you can override it.

**Defining Waiver Groups**

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

**Image: Waiver Groups page**

This example illustrates the fields and controls on the Waiver Groups page. You can find definitions for the fields and controls later on this page.

**Waiver Groups**

<table>
<thead>
<tr>
<th>Set ID:</th>
<th>PBUNV</th>
<th>Waiver Group: EQUATN_GRP</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Description:</em></td>
<td>Waiver Group using Equation</td>
<td></td>
</tr>
<tr>
<td><em>Effective Date:</em></td>
<td>01/01/1900</td>
<td><em>Status:</em> Active</td>
</tr>
</tbody>
</table>

**Waiver Code**

Add a waiver to the waiver group.

**Priority**

Enter a number from 1 to 998 to indicate the order 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 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.

Creating Course Lists

To set up course lists, use the Course Lists component (CRSE_LIST_PANEL).

Course lists represent a group of linked courses. You can assign a course fee to a course list rather than attaching the fee to specific courses. Course lists can also be used with third-party contracts to control what courses are covered by the sponsor contract.

Page Used to Create Course Lists

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Lists</td>
<td>CRSE_LIST_SF</td>
<td>Set Up SACR, Product Related, Student Financials, Course and Class Fees, Course Lists</td>
<td>Define course lists.</td>
</tr>
</tbody>
</table>
Defining Course Lists

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

Image: Course Lists page

This example illustrates the fields and controls on the Course Lists page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Sequence Number</th>
<th>PSUNV</th>
<th>Course List</th>
<th>Effective Date: 06/01/1998</th>
<th>Status: Add/Remove</th>
<th>WildCard Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institution: PSUNV PeopleSoft University</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Group: LBART College of Liberal Arts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject: MATH Mathematics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sequence Number</th>
<th>Course ID: 001061 Elementary Accounting</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

Note: The effective date of the course list cannot precede the effective date of the course catalog from which you select courses.

Sequence Number  Enter a sequence number for the class. Sequence numbers are important for writing course information to the table and cannot be duplicated. The sequence number does not affect the payment order.

WildCard Indicator  Select if you are creating a list of courses with like characteristics. When you select this option, the Institution, Acad Group, and Subject fields replace the Course ID field.

Institution  Select the appropriate institution. This field is available only if the WildCard Indicator check box is selected.

Academic Group  Select the academic group in which the courses reside. This field is available only if the WildCard Indicator check box is selected.

Subject  Select the subject area for the courses. This field is available only if the WildCard Indicator check box is selected.
Course ID

To create a course list using one or more specific courses, enter a course ID.