Oracle’s PeopleSoft 9.0
Student Financials
Changes and Updates for CS
Bundle #1

February 2007
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PeopleSoft Student Financials Documentation Updates for CS Bundle #1

Note. This document is an update to the PeopleSoft Enterprise Student Financials 9.0 PeopleBook. It describes the Product Update ID #682663 that was posted to Customer Connection in February 2007. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document discusses changes related to updates and fixes delivered with CS Bundle #1. Specifically, it discusses changes in:

- Defining AP set controls for vendors.
- Defining charge priority list rules.
- Defining origins and group types.
- Reviewing self service agreements.

See Also


PeopleSoft Enterprise 9.0 Student Financials PeopleBook, “Defining Origins and Group Types,” Understanding Origins and Group Types

PeopleSoft Enterprise 9.0 Student Financials PeopleBook, “Processing ePayment Transactions”

Defining AP Set Controls for Vendors

This section discusses changes related to how to define AP set controls for vendors.

Page Used to Define AP Set Controls for Vendors

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Object Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>AP Set Controls - Vendor</td>
<td>SF_AP_VNDR_OPTIONS</td>
<td>Set Up SACR, Product Related, Student Financials, Refunds, AP Set Controls - Vendor</td>
<td>Define vendor information.</td>
</tr>
</tbody>
</table>
Defining AP Set Controls for Vendors

The Student Financials Refund process sends student vendor data to accounts payable as suppliers. Students are exempt from specific tax requirements in some states, and there is no way to separate students from legitimate suppliers.

AP set controls insert information into vouchers produced for refunds using PeopleSoft Payables. Consult with your accounts payables staff to determine the proper settings.

Access the AP Set Controls - Vendor page.

**AP Set Controls - Vendor**

<table>
<thead>
<tr>
<th>Vendor Set ID:</th>
<th>SHARE</th>
</tr>
</thead>
</table>

**Vendor Classification**

Use this field to choose which value to use for the VENDOR_CLASS in the VENDOR_SYNC message for the AP Interface process for refunding.

You may select **Attorney**, **Employee**, **HRMS**, or **Supplier**. The default value is **Supplier**.

Defining Charge Priority List Rules

This section discusses changes related to how to define charge priority list rules.

**Page Used to Define Charge Priority List Rules**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Object Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge Priority List - Details</td>
<td>ITEM_CHRG_TYP_PRT2</td>
<td>Set Up SACR, Product Related, Student Financials, Charges and Payments, Charge Priority List, Details</td>
<td>Define charge priority list rules.</td>
</tr>
</tbody>
</table>

Oracle Proprietary and Confidential
Defining Charge Priority List Rules

Access the Details page.

Details page

The **Use Aid Year** check box is added to the page.

**Use Aid Year** Select this check box to use the financial aid year for the charge priority list. Clear the check box to apply current functionality and use the academic year.

Defining Origins and Group Types

This section discusses changes related to how to define group types.

Page Used to Define Group Types

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Object Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Type Table</td>
<td>GROUP_TYPE_TABLE</td>
<td>Set Up SACR, Product Related, Student Financials, Charges and Payments, Group Type Table</td>
<td>Define group types.</td>
</tr>
</tbody>
</table>
Defining Origins and Group Types

Before you can perform group data entry using the Maintain Receivables feature, you must define origins and group types.

Origins

Origins represent sources of charges or payments used during group posting. You can apply security at the origin level. This security limits the number of users who can view and update the transactions with which an origin is associated. You can also use the description you define for an origin as criteria for selecting groups during group data entry.

Group Types

Group types represent sets of frequently posted receivables such as financial aid, housing charges, and lock box payments. You can use the description of a group type as criteria for selecting groups for viewing during group data entry.

Defining Origins

Access the Group Type Table page.

**Group Type Table**

<table>
<thead>
<tr>
<th>SetID:</th>
<th>PSUNV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Type:</td>
<td>H</td>
</tr>
</tbody>
</table>

| Effective Date: | 01/01/900 |
| Status:         | Active    |
| Description:    | Housing   |
| Short Description: | Housing |

The **Create New Charge Item** check box is added to the page.

Create New Charge Item

Select this check box to create a unique item for each charge transaction in the group. Clearing the checkbox allows the charge items to be consolidated by Common_ID, Item Type, and Term. This field appears (grayed out) on the External Files run control page (RUNCTL_SFGPLOAD), the Create Group Data Entries page and the Create Group Corp Data Entries page (GROUP_ENT_ONE).
Self Service Agreements

This section discusses how to review self-service agreements.

Understanding Self-Service Agreements

An inquiry page is added for the administrative user to review the various self-service agreements that the student has signed.

The self-service features that require agreements include electronic check (eCheck) Make a Payment Transactions, 1098-T, Payment Plan Enrollment and Student Permissions.

Page Used to Review Self Service Agreements

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Object Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Self Service</td>
<td>SSF_AGREE_INQ</td>
<td>Student Financials, Charges and Payment, Electronic Transactions, Review</td>
<td>View self service agreements text and</td>
</tr>
<tr>
<td>Agreements</td>
<td></td>
<td>Self Service Agreements</td>
<td>authentication.</td>
</tr>
</tbody>
</table>

Reviewing Self Service Agreements

Access the Review Self Service Agreements page.

Review Self Service Agreements

<table>
<thead>
<tr>
<th>ID: SFPP00050</th>
<th>Agreement Number: 0000000000001</th>
<th>Agreement Status</th>
<th>User ID</th>
<th>Agreement Type: Payment Plan Enrollment</th>
<th>Agreement Date: 01/17/2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFPP00050</td>
<td>0000000000002</td>
<td>Accepted</td>
<td>SSS_SFPP00050</td>
<td>Student Permission</td>
<td>01/17/2007</td>
</tr>
<tr>
<td>SFPP00050</td>
<td>0000000000003</td>
<td>Accepted</td>
<td>SSS_SFPP00050</td>
<td>1098-T Consent</td>
<td>01/17/2007</td>
</tr>
<tr>
<td>SFPP00050</td>
<td>0000000000004</td>
<td>Accepted</td>
<td>SSS_SFPP00050</td>
<td>Electronic Check</td>
<td>01/17/2007</td>
</tr>
</tbody>
</table>

Review Self Service Agreements page
| **ID** | Enter the student or organization ID. |
| **ID Type** | Select *Person* or *Organization*. |
| **Agreement Number** | Enter the agreement number that is automatically assigned when the agreement is transacted during the self service activity. |
| **Agreement Type** | Leave blank to include all agreement types or select an agreement type. Values are *1098-T*, *Electronic Check*, *Payment Plan Enrollment*, or *Student Permission*. |
| **From and To Date** | Enter the date range of the processed agreements. |
| **Search** | Click to display the search results in the Details, Text, and Authentication tabs. |

**Details**
Select the Details tab.

**Agreement Status**
Displays the status of the agreement. Values are:

- *Accepted* when a self service agreement has been successfully transacted.
- *Revoked*. For 1098-T agreement types, the student can request to cancel her ability to view 1098-Ts online.
### Review Self Service Agreements

**Select the Text tab.**

#### Agreement Text

<table>
<thead>
<tr>
<th>ID</th>
<th>Agreement Number</th>
<th>Agreement Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFPP00050</td>
<td>000000000001</td>
<td>I agree to the installment schedule listed above. If I default on any installments, I understand that full amount may be due immediately and a hold will be placed on my account.</td>
</tr>
<tr>
<td>SFPP00050</td>
<td>000000000002</td>
<td>Permission to apply Title IV financial aid funds to all charges appearing on the account.</td>
</tr>
<tr>
<td>SFPP00050</td>
<td>000000000003</td>
<td>I agree to receive my 1098-T Tax form electronically through on-line access. Clicking the Yes, I have read the agreement checkbox means you will no longer receive the 1098-T form via US mail. Click the Submit push button to always access your 1098-T on-line. Click the Cancel push button to return to the 1098-T Year selection.</td>
</tr>
<tr>
<td>SFPP00050</td>
<td>000000000004</td>
<td>I hereby authorize the University to initiate debit entries to my Depository, according to the terms above, and for my Depository to debit the same to such account. In the event that this electronic payment is returned for &quot;NSF&quot; or 'Non-Sufficient Funds', I understand that a return fee of $30.00 will be applied to my account.</td>
</tr>
</tbody>
</table>

**Note:** The text in this field will vary according to the agreement type used by the student.
Authentication

Select the Authentication tab.

Review Self Service Agreements

Authentication Method

Displays the method by which the student authenticated their identity. Values are **NID (national id)**, **Birthdate**, **PIN (personal identification number)** or **No Auth (no authentication)**.