



Student Financials Fundamentals Rel 9.2

In addition to defining rules for calculating and collecting tuition and fees, participants learn how to set up the PeopleSoft Enterprise Student Financials accounting structure (Business Units, Account Types, and Item Types). In depth activities provide participants with hands-on experience on how to set up security options and trees. Participants use workflow to review and approve groups of transactions and also learn how financial data is transmitted and received for groups of students. Additionally, this course demonstrates how a student's account is updated with anticipated aid and how aid is disbursed into the student account to reduce the balance. Participants prepare for billing customers, create billing standard requests, and design the invoice layout. Finally, participants review refunding rules, process a withdrawal, and run a batch refund.

Learn To:

- Enroll students in terms, programs and plans
- Set up and calculate tuition and fees
- Authorize and disburse financial aid
- Set up the student financials foundation
- Bill customers
- Process refunds and withdrawals

Prerequisites

Suggested Prerequisite

- Understanding of the Campus Solutions academic structure

Required Prerequisite

- Understanding of basic navigation and PeopleSoft concepts
- Able to run processes and reports
- Use of control tables to enforce business rules

Audience

- Analyst
- Implementer
- Manager

Objectives

- Calculate tuition and fees
- Define the PeopleSoft Student Financials Foundation
- Review tuition and fee calculations
- Maintain receivables
- Disburse financial aid
- Bill customers
- Setup service indicators
- Process refunds
- Setup tuition and fee calculations

Topics

- Setting Up Tuition and Fee Calculations
 - Describing PeopleSoft Campus Solution components
 - Describing the set up for calculating tuition
 - Defining term and session tables
 - Setting up calendars
 - Establishing minimum and maximum fees
 - Defining criteria, tuition groups and waivers
 - Charging course fees
 - Scheduling classes
- Calculating Tuition and Fees
 - Adding students to programs
 - Activating students in a term
 - Calculating tuition and fees
 - Reviewing PeopleSoft Student Financials Self Service
- Defining the PeopleSoft Student Financials Foundation
 - Using keywords to search for item types
 - Setting up item types
 - Securing PeopleSoft Student Financials
 - Creating charge priority lists
 - Setting up global invoicing
 - Implementing payment swapping
- Reviewing Tuition and Fee Calculations
 - Defining transaction and optional fees
 - Setting up self service miscellaneous purchases
 - Describing the population selection update process
- Maintaining Receivables
 - Defining posting parameters in business units
 - Using workflow to notify users
 - Defining groups types and origins
 - Reviewing posting functionality
- Disbursing Financial Aid
 - Awarding financial aid manually
 - Passing anticipated aid

- Disbursing financial aid
- Reviewing global disbursement rules
- Performing batch authorization and disbursement
- Billing Customers
 - Billing a customer
 - Preparing for billing
 - Using the payment applier
- Setting Up Service Indicators
- Processing Refunds
 - Describing refunding
 - Defining refunding rules
 - Defining Payroll and AP refunding rules
 - Creating student online and batch refunds