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PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook

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Contents

PeopleSoft Enterprise Campus Self Service Preface

This preface discusses:

- PeopleSoft Enterprise Campus Solutions Application Fundamentals.
- PeopleBook structure.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or application.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Campus Self Service.

PeopleSoft Enterprise Campus Solutions Application Fundamentals

Essential information describing the setup and design of your system appears in two companion volumes of documentation, *PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook,*and *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

Whether you are implementing one Campus Solutions application, a combination of Campus Solutions applications, or the entire Campus Solutions product line, you must become familiar with information provided in these two fundamental books for successful implementation.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook.

Chapters	***Description***
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

Chapters	***Description***
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Chapter 1

Getting Started with PeopleSoft Enterprise Campus Self Service

This chapter discusses:

- Campus Self Service overview.
- Campus Self Service business processes.
- Campus Self Service integrations.
- Campus Self Service implementation

Campus Self Service Overview

Campus Self Service offers role-based and function-based self-service functionality that enable you to provide users with self-service access to information and transactions over the internet. You can present the self-service functionality as delivered or modify it to present specific features that your institution wants to make available, offering access to the online transactions that your institution's users need and perform most.

Allowing users to complete transactions by self-service significantly reduces the time that your staff must spend entering and maintaining administrative data.

Note. PeopleSoft Campus Self Service integrates with PeopleSoft Enterprise Campus Solutions, and it is licensed separately.

Campus Self Service Business Processes

Campus Self Service business processes are extensions of information and functionality of PeopleSoft Enterprise Campus Solutions applications.

Note. For full implementation planning, you will also want to read all of the setup chapters in this PeopleBook, in the*PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook* and the *PeopleSoft Enterprise Campus Solutions 9.0 Fundamentals PeopleBook*, and take advantage of all PeopleSoft sources of information, including PeopleBooks for the individual PeopleSoft Enterprise Campus Solutions applications, installation guides, table-loading sequences, data models, and business process maps.

Campus Self Service enables you to provide self-service functionality from the following familiar PeopleSoft Enterprise Campus Solutions applications:

- *Campus Community*

  Campus Community offers self-service Campus Personal Information and Community Directory Search.

  The Community Directory Search self-service functionality enables you to provide searchable directories of members of your campus community online over the internet.

  Campus Personal Information self-service provides configurable internet access to the following:

  - Names, Addresses, Phone Numbers
  - Emergency Contacts
  - Extracurricular Activities
  - FERPA Privacy Control
  - Languages
  - Work Experience
  - Licenses and Certificate
  - Publications
  - Memberships
  - Honors and Awards
  - Service Indicators as Holds Lists
  - Checklists as To Do Lists

- *Recruiting and Admissions:*

  Recruiting and Admissions provides your users the ability to perform several transactions directly over the internet.

  Recruiting and Admissions self-service provides configurable internet access to the following:

  - Visitors can request information from your institution and a particular academic career and program. When visitors request information over the internet, they enter information about themselves that the system converts to prospect data.
  - Applicants can accept or decline admission.
  - Applicants can view their application status.
  - Administrators can view prospect and applicant information by category, region, and organization.

- *Student Records:*

  Student Records provides students and faculty the ability to perform several transactions directly over the internet.

  Student Records self-service provides students or faculty access to the following:

  - Student Center

    A self-service page that provides students a single entry point from which to begin navigation to student related transactions. The Student Center also presents to students, in one location, the information that is important to them, such as their class schedule, important dates, to do list, and account information.

  - Student Planner

    A self-service page that provides students with a tool to plan their courses for an individual term, multiple terms, or their entire stay at the institution.

  - Enrollment Shopping Cart

    A staging area where students can plan and build their schedules for an upcoming term.

  - Enrollment

    Students can add, drop, swap, and edit classes with the help of a step by step wizard feature exists that guides students through the processes. Students can also view assignments, class and exam schedules, and enrollment dates, and search for classes and browse the course catalog.

  - Academic Records

    Students can view grades, request official transcripts, view unofficial transcripts, view advisor information, and request enrollment verification.

  - Degree Progress/Graduation

    Student can view their degree progress report and apply for graduation.

  - Transfer Credit

    Students can model transfer credit and run a transfer credit report.

  - Faculty Center

    On the Faculty Center self-service page, instructors can view their class and exam schedules; search for faculty and classes; browse the course catalog; and access class rosters, grade rosters, learning management system web sites, and advisee information.

- *Financial Aid:*

  Financial Aid provides students the ability to perform several transactions directly over the internet.

  Financial Aid provides students access to the following:

  - Accept/Decline Awards

    Students can accept, decline, or reduce award amounts. They can request a change to their financial aid, cancel their aid, or request a meeting with a financial aid administrator.

  - View Financial Aid

    Students can view their cost of attendance, expected family contribution, total aid, type of award, loan application status, loan amount, loan fee, and scheduled disbursement data.

- *Student Financials:*

  Student Financials provides students and faculty the ability to perform several transactions directly over the internet.

  Student Financials self-service provides students or faculty access to the following:

  - Account Inquiry

    Students can view details about their financial account.

  - Payment Profile

    Students can create and maintain payment profiles for credit card or eCheck account details.

  - Make a Payment

    Students can use the payment wizard to make credit card or eCheck payments to their account.

- *Contributor Relations:*

  Contributor Relations provides fundraisers with bundled prospect information in Outreach. For development officers who have responsibility for cultivating prospects and raising funds, Outreach enables them to access prospect information and giving strategy through a single location.

  Outreach self-service functionality provides access to the following:

  - Strategy information—to add, update, and view prospect strategies and link actions to those strategies. Then users can view strategy summaries and associated actions.

  - Action Plans and Results—to add and update actions, and report results. Users can also view action and contact report summaries and clearances.

  - To Do Lists—to create individual staff to do lists displaying information about prospects. Then users can view, sort, and update the lists.

  - Analysis—access to a wide variety of online reports.

Campus Self Service Implementation

If you have licensed and implemented all of PeopleSoft Enterprise Campus Solutions, then most of the setup required to implement Campus Self Service is already completed. The additional setup specific to self service is discussed in this PeopleBook.

Campus Self Service has no PeopleSoft Setup Manager component interfaces.

Chapter 2

Understanding PeopleSoft Enterprise Campus Self Service

Campus Self Service offers role-based and function-based self-service functionality that enable you to provide users with self-service access to information and transactions over the internet. You can present the self-service functionality as delivered or modify it to present specific features that your institution wants to make available, offering access to the online transactions that your institution's users need and perform most.

Allowing users to complete transactions by self-service significantly reduces the time that your administrative staff must spend performing many administrative tasks:

Note. PeopleSoft Enterprise Campus Self Service integrates with PeopleSoft Enterprise Campus Solutions, but it is licensed separately.

Chapter 3

Setting Up Self-Service Navigation

Use the Navigation Tabs Setup (SSS_NAV_SETUP) component to define the two-level folder tabs for self-service applications.

This chapter discusses how to set up self-service navigation.

Setting Up Self-Service Navigation

You can change the name and order of the navigational tabs that appear in student Self Service for each of the functional areas — Campus Community, Faculty Center, Financials and Student Records.

This section discusses how to:

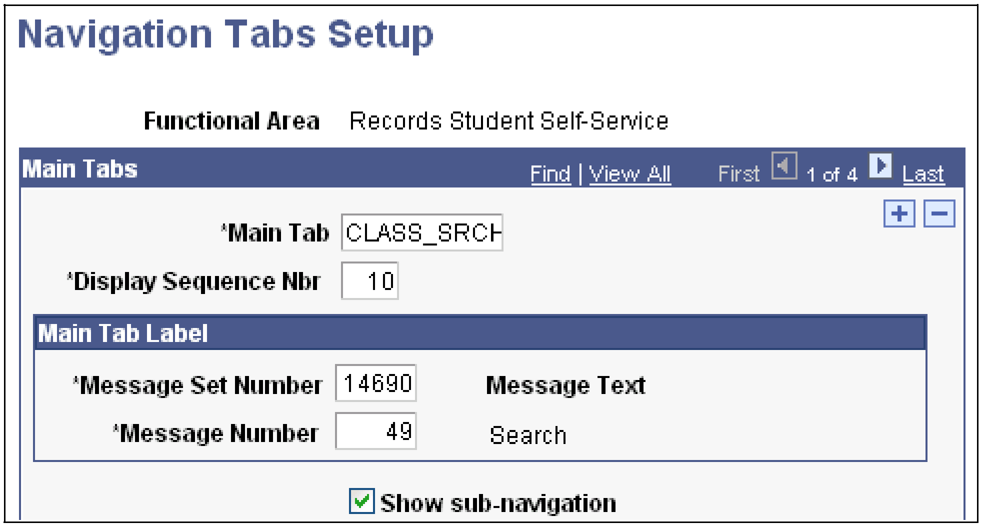
- Define tabs for self-service applications.
- Set up the Enrollment tab for Student Records Self Service.

Page Used to Define Tabs for Self-Service Applications

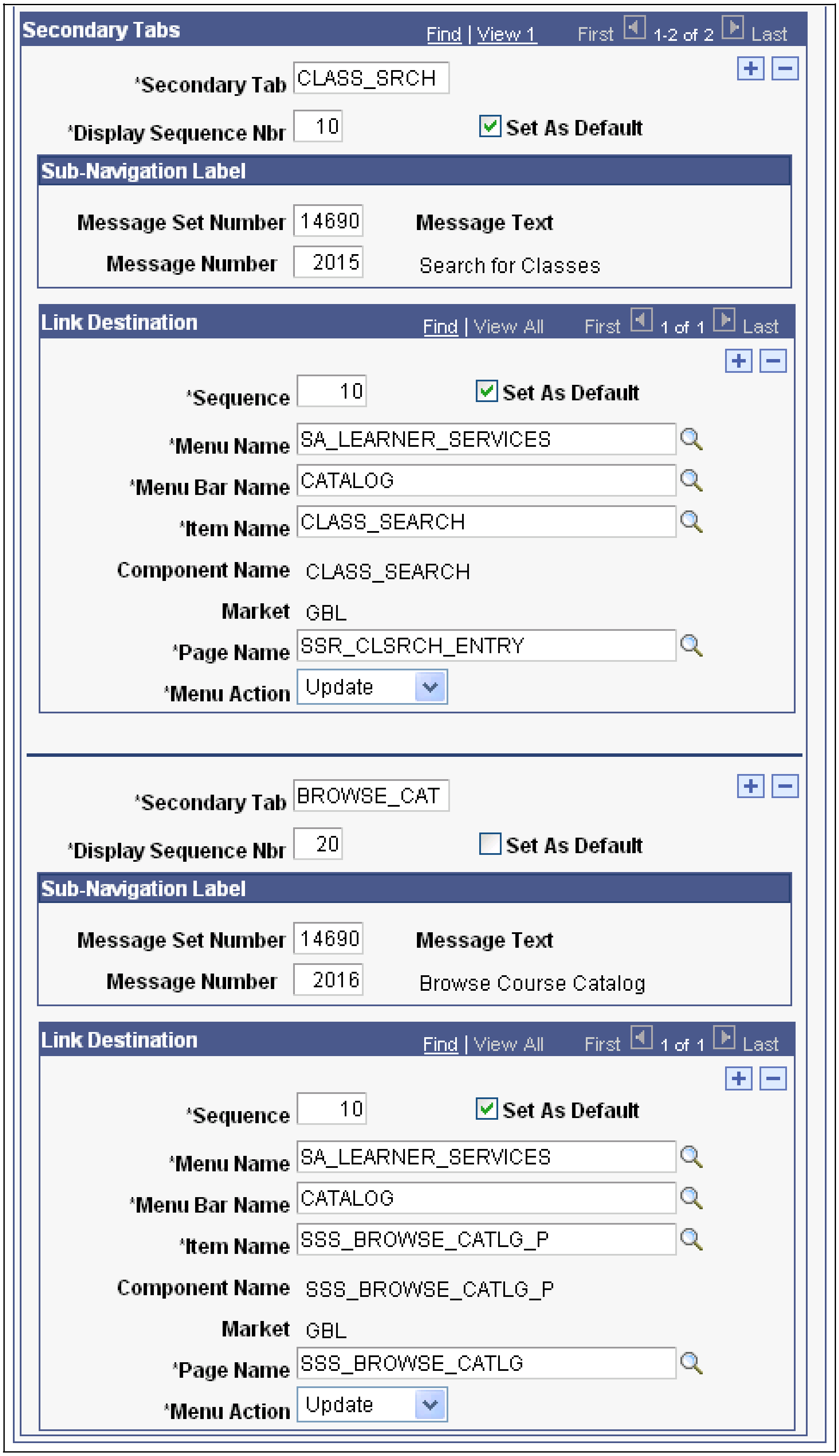
Page Name	***Definition Name***	***Navigation***	***Usage***
Navigation Tabs Setup	SSS_NAV_SETUP	Set Up SACR, Common Definitions, Self Service, Navigation Tabs, Navigation Tabs Setup	Define tabs for self-service applications.

Defining Tabs for Self-Service Applications

Access the Navigation Tabs Setup page (Set Up SACR, Common Definitions, Self Service, Navigation Tabs, Navigation Tabs Setup).



Navigation Tabs Setup page (1 of 2)



Navigation Tabs Setup page (2 of 2)

You can use the Navigation Tabs Setup page to:

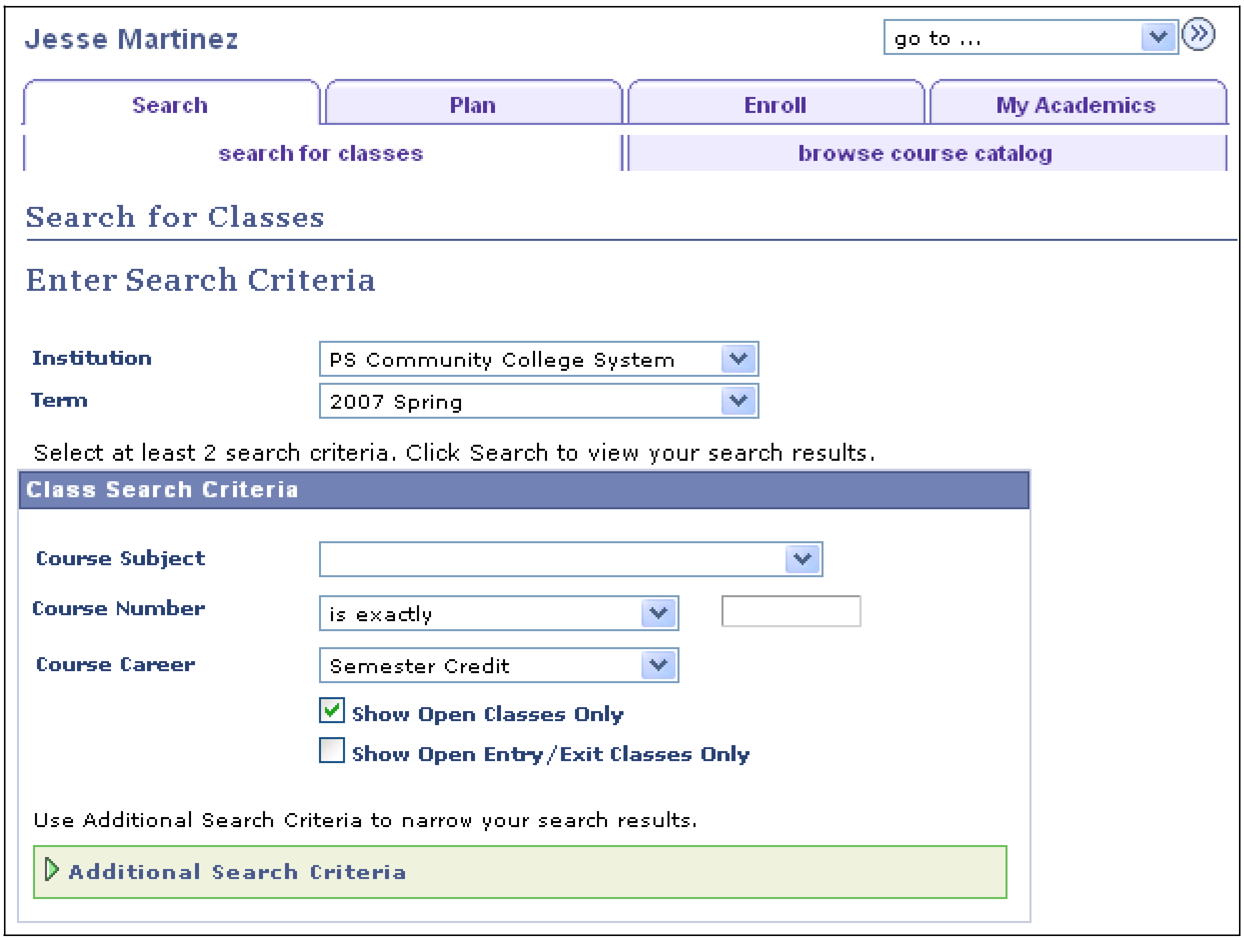
- Change the name of a tab in Self Service (which also changes the Student Center links).
- Change sequence numbers and set secondary tab defaults to change the order of the tabs and the secondary tabs.
- Add additional tabs.

The Show sub-navigation check box is selected by default. You might want to clear this check box if you use only one of the subtabs or pages in a particular area.

Only users with security access to the Navigation Tabs Setup component can configure the tabs.

In Self Service, students can access only the tabs for which they have access to the relevant component. For example, if course history is a secondary tab under the Plan main tab and a student does not have access to the SSS_MY_CRSEHIST component, the student cannot see the course history tab.

Here is an example of the self-service Search for Classes page:



Example of the Search for Classes page

You can see how the text in the Message Text fields on the setup page correspond to the tab names in Self Service.

The Search tab has the lowest sequence number in the Main Tabs group box on the setup page and therefore appears first in Self Service. Similarly, the search for classes tab appears before the browse course catalog tab because of the sequencing of the secondary tabs on the setup page.

When students access the Search tab, the search for classes tab appears by default because the Set as Default check box is selected for that tab on the setup page.

To change the name of a tab, modify the delivered text in the Message Text field on the Message Catalog page (PeopleTools, Utilities, Administration, Message Catalog) or add a new message to the message catalog and associate that message with the tab.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*

Note. If you map a component to more than one navigation path, you receive a warning message indicating that duplicate navigation entries exist for the component. You can save the settings, but the first navigation path to which a component is mapped in the setup is always used regardless of how many paths are mapped.

Setting up the Enrollment Tab for Student Records Self Service

You can use one of the two delivered variations of the shopping cart component under both the Plan, shopping cart tab and the Enroll, add tabs.

You can set up the add tab so that when students access that tab, they are taken to the version of the component that is used on the shopping cart tab—that is, the version with the Select check box for each class.

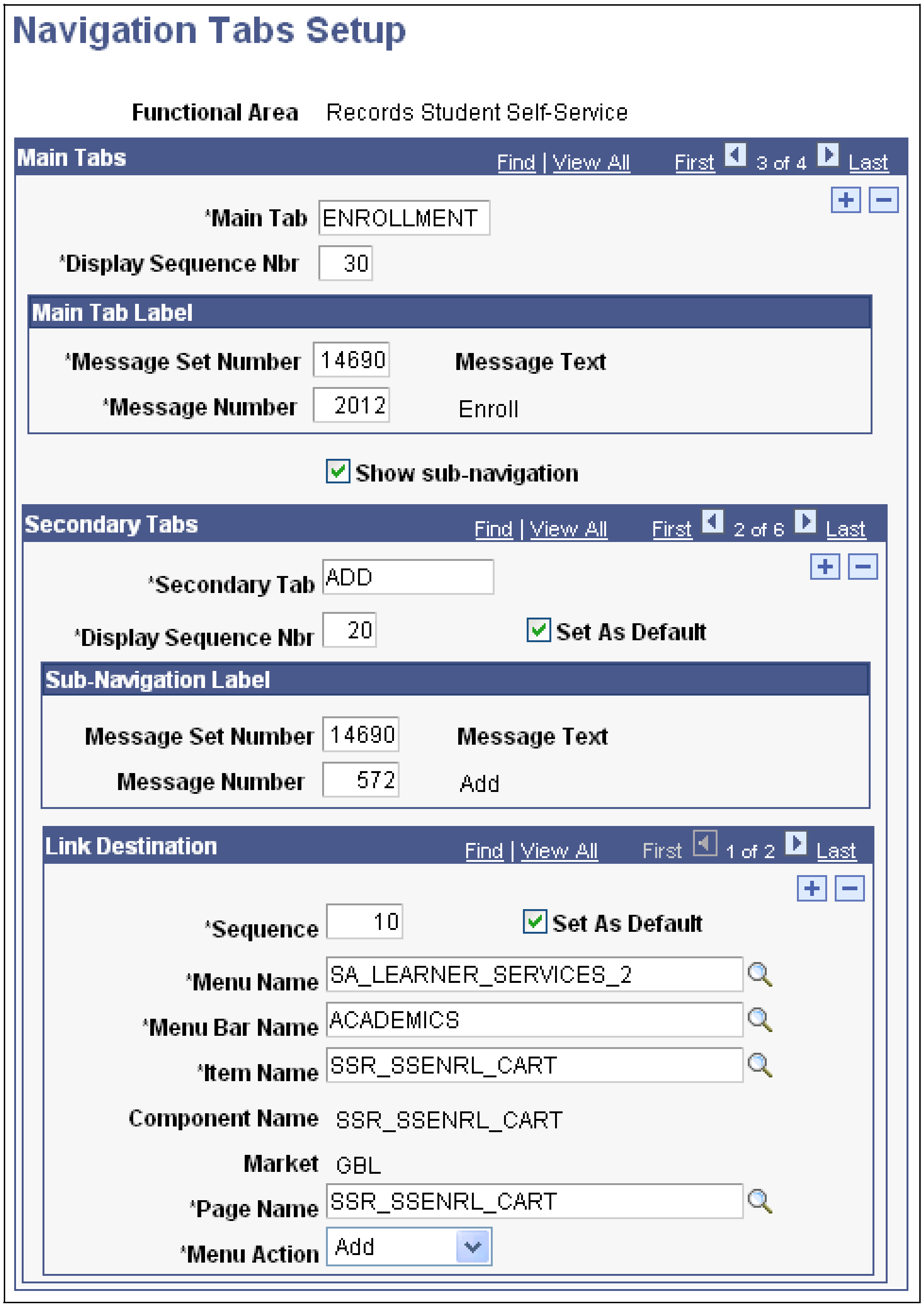
Here are the set up steps:

- On the Navigation Tabs Setup page (for Student Records), select *ENROLLMENT* in the Main Tab field in the Main Tabs group box.
- In the Secondary Tabs group box, select *ADD* in the Secondary Tab field.
- In the Link Destination group box, select *SA_LEARNER_SERVICES_2* in the Menu Name field.

  Note. Two rows exist in this group box. Ensure that you select *SA_LEARNER_SERVICES_2* in both rows.

- Click Save.

Here is an example of the setup for the add tab using SA_LEARNER_SERVICES_2:



Example of setup for the add tab using SA_LEARNER_SERVICES_2

The add tab in Self Service uses the version of the component with the Select check box:

Example of the add tab in Student Center

If you select SA_LEARNER_SERVICES in the Link Destination group box, the Select check box does not appear on the add tab in Self Service. The check box appears only on the shopping cart tab.

You can use the Message Catalog (PeopleTools, Utilities, Administration, Message Catalog) to change the title text that appears on the add and shopping cart tabs. The existing text appears on the previous example page.

Chapter 4

Setting Up Type Control

You can assign levels of control for the types of personal data that you want to provide to self-services users.

This chapter discusses how to set up type control.

Setting Up Type Control

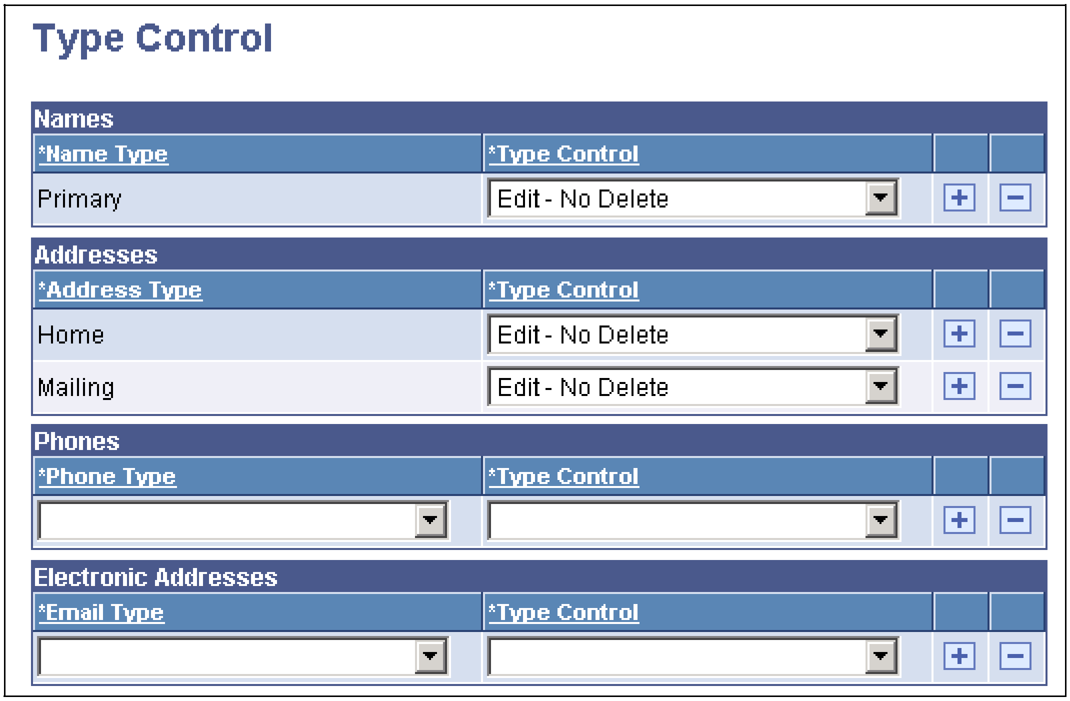
This section discusses how to set type controls.

Page Used to Set Up Type Control

Page Name	***Definition Name***	***Navigation***	***Usage***
Type Control	TYPE_CNTL_SETUP	Set Up SACR, Common Definitions, Self Service, Type Control	Set type controls to identify the types of names, addresses, phones, and email addresses for self-service users to view, edit, or delete.

Setting Type Controls

Access the Type Control page (Set Up SACR, Common Definitions, Self Service, Type Control).



Type Control page

Type Control

Select the level of control that you want to apply to the data type when you provide it to self service users. For example, if you want to make phone numbers available to self-service users and permit them to edit or delete the phone numbers, but you do not want them to be able to delete the *Home* phone type, select the control type of *Edit - No Delete* for that phone type.

Warning! If no type control is selected, the system uses *Full Edit.*

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 could require substantial programming effort. The options are:

Display Only: Exposes this information to self-service users. Does not permit them to enter or edit the specified type or its associated data.

Do Not Display: Does not expose this information (neither the type nor its associated data) to self-service users.

Edit - No Delete: Exposes this information to self-service users. Permits them to edit the data, but does not permit them to delete the type.

Full Edit: Exposes this information to self-service users. Permits them to edit and delete the specified type and its associated data. (This is the least restrictive and the default value.)

Important! You cannot change the Name Type *(Primary)* or the Address Types *(Home* and *Mailing)* values. These are set on the Campus Community Installation Names/Addresses page.

PeopleSoft delivers these with *Edit* **-** *No Delete* type control level. You cannot apply the lesser restrictive control of *Full Edit* to them, however you can apply the more restrictive controls of *Display Only* or *Do Not Display*.

Self-services users can change data for these address types, but they cannot delete the types. Therefore the Delete (Home) address(es) and Delete (Mailing) address(es) links are never available on the Current Addresses page. If you modify these mapping types on the Installation Table, you must also modify the type control settings on the Type Control page.

Chapter 5

Setting Up Student Records Self-Service

This chapter provides an overview of enrollment error messaging and in self service and discusses how to:

- Set up self-service features for Student Records.
- Set up a self-service Student Center.

Understanding Self-Service Enrollment Error Messaging Setup

The system generates enrollment request error messages during the process of adding and dropping classes. This feature is available not only for administrative but also for student self-service enrollment pages. However, for self-service users you must first:

- Select the Enrollment Information check box in the Enrollment Preferences group box on the Enrollment setup page.
- Select the Enroll Info: Enrollment Req check box in the Class Detail Optional Self-Service Fields group box on the Class Search setup page.

These two check boxes control whether requisite descriptions appear on the Enrollment Preferences page when students add a class or click a class link in which they're enrolled. They also determine:

- Whether requirement group descriptions appear on the View Results page in self-service enrollment.
- Whether the descriptions appear when a student validates a shopping cart entry.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component

Setting Up Self-Service Features for Student Records

To set up self-service Student Records, you use the Student Records component (SSR_SS_ENRL_OPT) and the Weekly Schedule Time Period component (SETUP_TIME_PERIODS).

This section discusses how to:

- Define Student Records setup.

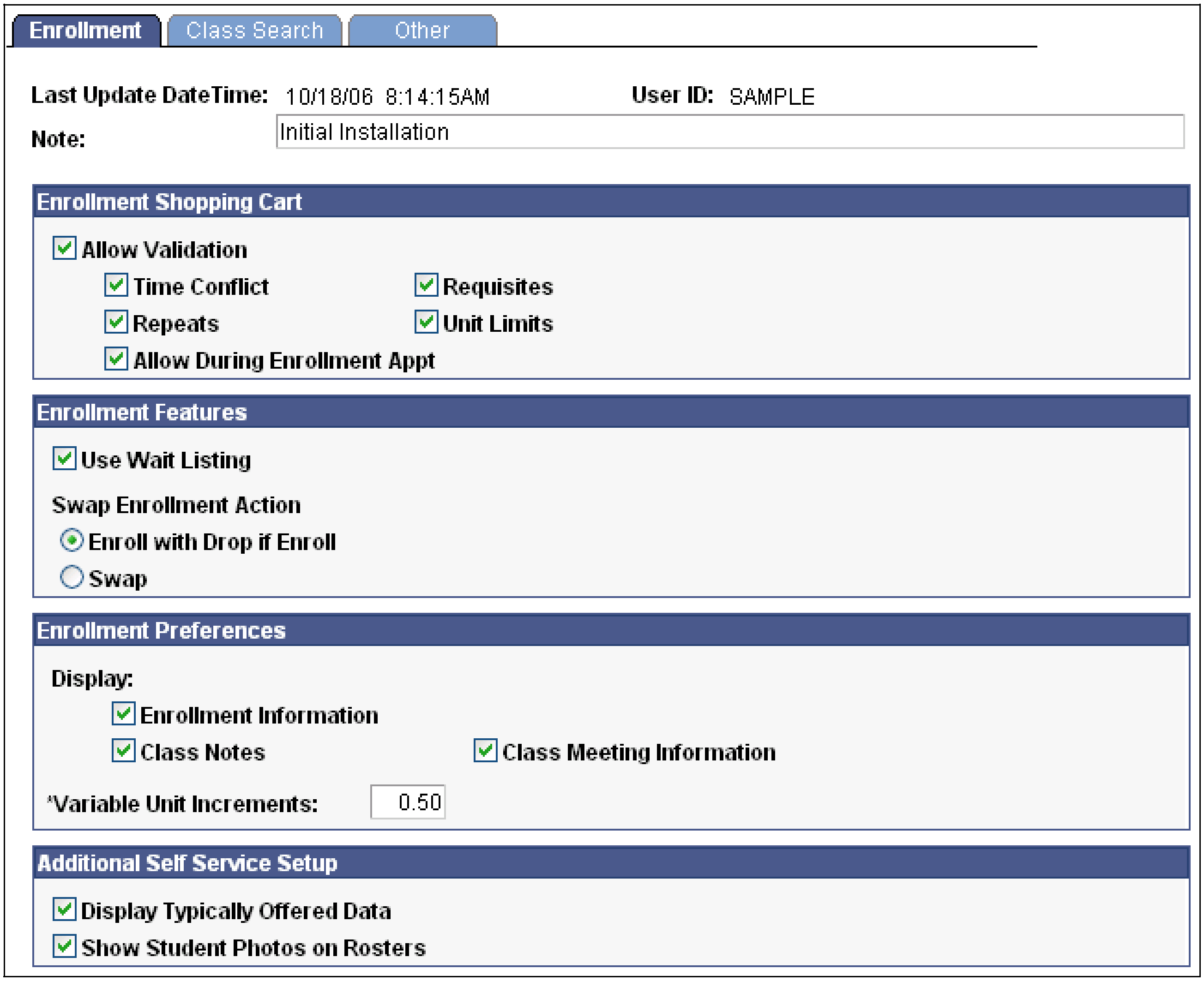
- Define class search setup.
- Defining other Student Record self-service options.
- Set up weekly schedule time periods.

Pages Used to Set Up Self-Service Features for Student Records

Page Name	*Definition Name*	*Navigation*	*Usage*
Enrollment	SSR_SS_ENRL_OPT	Set Up SACR, Common Definitions, Self Service, Student Records, Enrollment	Enable self-service features and define parameters and rules for self-service Student Records functionality.
Class Search	SSR_SS_CLSRCH_OPT	Set Up SACR, Common Definitions, Self Service, Student Records, Class Search	Select the fields that appear on the self-service Class Search and Class Detail pages.
Other	SSR_SS_OTHR_OPT	Set Up SACR, Common Definitions, Self Service, Student Records, Other	Controls the display of phone details for advisors and committee members on the My Advisors page, controls whether advisors have access to non-advisee data from the View My Advisees page, and provides options for how to search for a Faculty member.
Weekly Schedule Time Periods	SETUP_TIME_PERIODS	Set Up SACR, Product Related, Student Records, Enrollment, Weekly Schedule Time Periods	Define the times that define the ranges of time that the system displays on the Weekly Schedule page for both instructors and students. The PeopleSoft system delivers a set of time periods for every hour in a 24-hour period. You can modify or add to these values to meet your business requirements; for example, you can add half-hour intervals.

Defining Student Records Setup

Access the Enrollment page (Set Up SACR, Common Definitions, Self Service, Student Records, Enrollment).



Enrollment page

Note Enter descriptive information about the setup. This field is for informational purposes only.

Enrollment Shopping Cart

Allow Validation Select to enable the Validation feature. This feature enables self-service users to validate their Shopping Cart entries against a subset of edits from the Enrollment Engine. You can select which edits the Enrollment Engine runs. The options are time conflicts, repeats, requisites, and unit limits. If you select this check box, you must select at least one of these options. Clearing this check box hides all references to validation in the system.

Time Conflict Select this check box if you want the Enrollment Engine to check time conflicts while validating Shopping Cart entries.

Repeats	Select this check box if you want the Enrollment Engine to check repeats while validating Shopping Cart entries.
Allow During Enrollment Appt (allow during enrollment appointment)	Select to enable users to validate their Shopping Cart entries during their enrollment appointment. If you select this check box, the Validate button appears in the Shopping Cart during the student's enrollment appointment. If you clear this check box, the Validate button is not available in the Shopping Cart during the student's enrollment appointment. This option prevents you from having to set up validation appointments that parallel your enrollment appointments.
Requisites	Select this check box if you want the Enrollment Engine to check requisites while it validates Shopping Cart entries.
Unit Limits	Select this check box if you want the Enrollment Engine to check unit limits while it validates Shopping Cart entries.

Enrollment Features

Use Wait Listing	Select to enable wait listing. If you clear this check box, the system hides all references to wait listings in self-service. If you clear this check box, the system selects the Swap option by default and makes the Enroll with Drop if Enroll and Swap fields unavailable for edit.

Swap Enrollment Action This field controls the processing of enrollment requests submitted from the Swap component in student self-service.

Select one of these options:

Enroll with Drop if Enroll: Select this check box to enable Drop if Enroll processing for self-service swaps. If you select this check box, when a student swaps from one class to another or to a different enrollment component of the same class, the enrollment engine drops the student from the class that the student wants to swap only after the student is enrolled in the preferred class. The enrollment engine does not drop a student who is on the wait list for the preferred class. The enrollment engine processes the preferred class with an enrollment action of *Enroll.*

Swap: If you select this check box, when a student swaps from one class to another (or a different enrollment section of the same class), the enrollment engine drops the student from the unwanted class if they are successfully enrolled or when they are placed on the wait list in the preferred class.

Note. If the swap is for non-enroll components only, the request is processed with a Swap action regardless of the option that is selected on this setup page.

When a student tries to swap only the non-enroll component(s) on the Swap component (no change to the enrollment component), the transaction is submitted to the enrollment engine with an enrollment action of Swap (instead of Enroll with Drop if Enroll). This ensures that the student is enrolled (or wait listed) in the right combination of enrollment and non-enroll components. For example, if a student is enrolled in CHEM 102 lecture section 1 plus related lab 1A and tries to swap to a closed lab, 1B, electing to wait list, the transaction is submitted as non-enroll swap (i.e. swap section 1 to section 1 with related section 1B) where the student's status will be changed from enrolled to wait listed for the lecture section, wait listed in the non-enroll lab section (1B), and dropped from their original lab section (1A).

Enrollment Preferences

Select the information that you want to appear in student self service.

Enrollment Information Select to display enrollment requisite information about the self-service Enrollment Preferences page during the enrollment process.

Class Notes Select to display class notes information on the self-service Enrollment Preferences page during the enrollment process.

Class Meeting Information Select to display class meeting information on the self-service Enrollment Preferences page during the enrollment process.

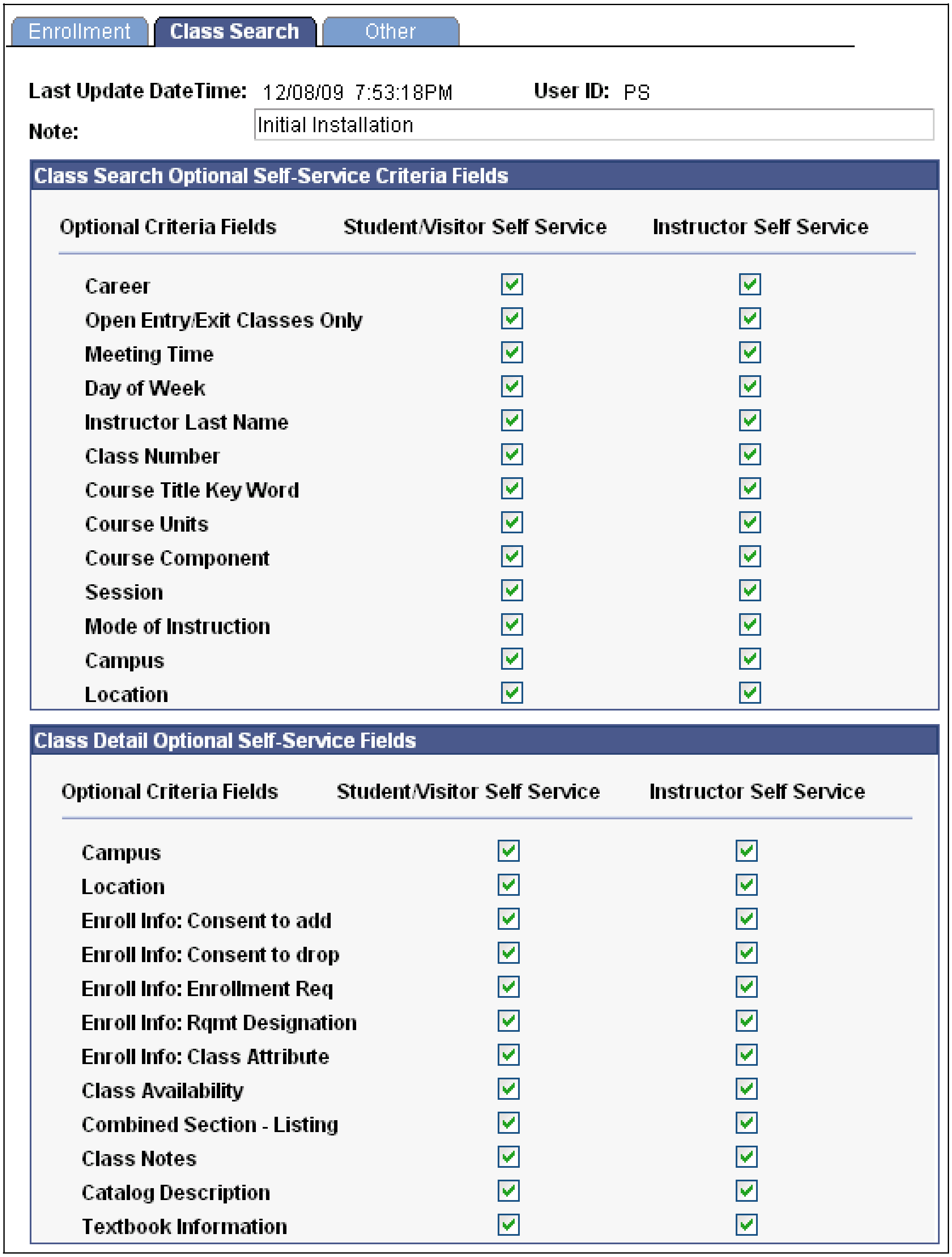
Variable Unit Increments Enter a value to control how unit increments appear to students when students select a unit value for a variable unit course. For example, if students are allowed to enroll in half units, enter *0.50* in this field. A student who enrolls in a class with a variable unit range of 1 to 3 units is then presented with the following options: 1.00, 1.50, 2.00, 2.50, 3.00.

Additional Self Service Setup

Display Typically Offered Data	Select to display when a course is usually offered at the institution. If this check box is selected, the data appears on a variety of self-service pages, including Browse Course Catalog, Course Detail, My Planner, and My Academic Requirements. If you clear the check box, the system does not display typically offered data within self-service, but it continues to display it on administrative pages. Typically offered values are institutionally defined within a typically offered setup page. They are then assigned to courses on the Course Catalog - Offerings page.
Show Student Photos on Rosters	Select this check box if you want student photos to appear on the class and advisee rosters in the Faculty Center.

Defining Class Search Setup

Access the Class Search page (Set Up SACR, Common Definitions, Self Service, Student Records, Class Search).



Class Search page

Class Search Optional Self-Service Criteria Fields

Select the search criteria fields that you want available in self-service class search for students and visitors and for instructors. For example, if you select Session for Instructor Self Service, then instructors who use class search in self-service can use *session* as a search criterion.

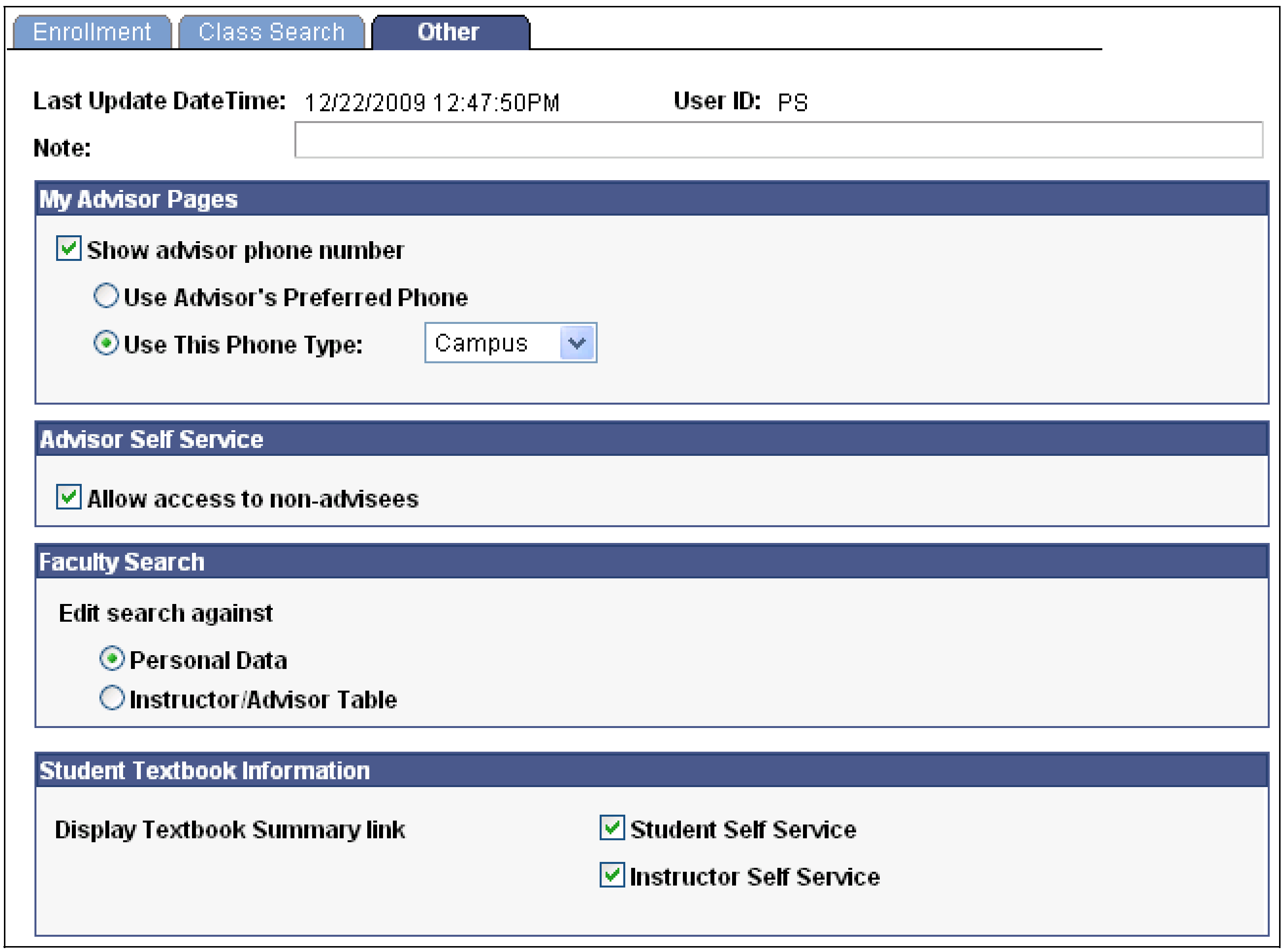
Class Detail Optional Self-Service Fields

Select the fields that you want to appear on the self-service Class Detail page for students and visitors and for instructors. For example, if you select Enroll Info: Enrollment Req (enrollment information: enrollment requisite) for Student/Visitor Self Service, then a student or visitor who clicks a class to view the Class Detail page will see the enrollment requirement requisite information for that class. Clear these check boxes if you do not want to provide this information on the self-service Class Detail page.

Note. All check boxes are selected by default except for Textbook Information.

Defining Other Student Record Self–Service Options

Access the Other page (Set Up SACR, Common Definitions, Self Service, Student Records, Other).



Other page

My Advisor Pages

Use the My Advisor Pages group box to control the display of phone details of advisors, committee members, or both on the My Advisors page.

Note. You should select the same advisor phone number value on this page and on the Student Center Options page in the Student Center component (SSS_STUDENT_CENTER).

Advisor Self Service

Allow access to non-advisees

If this check box is selected, the VIEW DATA FOR OTHER STUDENTS button becomes available on the View My Advisees – Advisee Roster page in Faculty Center. The check box is selected by default.

Advisors can access student data for non-advisees by clicking the VIEW DATA FOR OTHER STUDENTS button, which takes them to a search page.

If the Allow access to non-advisees check box is cleared, advisors cannot access student data for non-advisees. The VIEW DATA FOR OTHER STUDENTS button is hidden. If, when viewing an advisee's data, an advisor clicks the Return to Search button, the advisor is taken to a search page on which only their advisees are available.

Faculty Search

Use this group box to control the data that you want to search against when you use the Locate a Faculty Member page in Faculty Center.

You can search against the entire population in the database or against data in the Instructor/Advisor Table component (INSTR_ADVSR_PERS).

Personal Data

Select this option to search against the entire population in the database when you use the Locate a Faculty Member page in Faculty Center.

Instructor/Advisor Table

Select this option to search against data in the Instructor/Advisor Table component when you use the Locate a Faculty Member page in Faculty Center.

Warning! You must be careful when setting up Self Service Faculty Search. You do not have to use the Instructor/Advisor Table component to assign instructors to classes. You should therefore select the option to edit the search for faculty members against data in the Instructor/Advisor Table component only if the Instructor/Advisor option is selected in the Edit Instructor Against group box on the Academic Organization Table page.

Student Textbook Information

Display Textbook Summary link

If you select the Student Self Service and Instructor Self Service check boxes, the View Textbook Summary link appears on the Student Self Service, My Class Schedule page and the Faculty Center, My Schedule page. Students and faculty staff can use the link to access a summary of the textbook assignments for each of their classes for the term.

Clear the check boxes if you do not use the textbook feature or if you want to disable access to the Textbook Summary page.

See Also

Chapter 11, "Using Faculty Center," page 113

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Designating Approved Instructors and Advisors

Setting Up Weekly Schedule Time Periods

Access the Weekly Schedule Time Periods page (Set Up SACR, Product Related, Student Records, Enrollment, Weekly Schedule Time Periods).

Time Enter a range of values to define the periods of time that you want to appear on the self-service weekly schedule. The PeopleSoft application delivers a set of time periods for every hour in a 24-hour period. You can modify these values.

This field also controls the self-service exam schedule weekly view, in both the Student Center and Faculty Center. Hours can be subdivided into 30- and 15-minute intervals.

Note. To print the weekly schedule in full color, Internet Explorer 7 users must change their settings as follows: Tools, Internet Options, Advanced, Printing, select "Print background colors and images." Without this setting, the schedule will print, but without background color.

Setting Up a Self-Service Student Center

To set up a student center, use the Student Center component (SSS_STDNCTR_OPT).

This section provides an overview of defining student center setup options and discusses how to define self-service Student Center setup options.

Understanding Defining Student Center Setup Options

The Student Center page is a self-service page that provides students a single entry point from which to navigate to student-related transactions. It also provides a single location where students can see information that is important to them, such as their class schedule, enrollment dates, and account information.

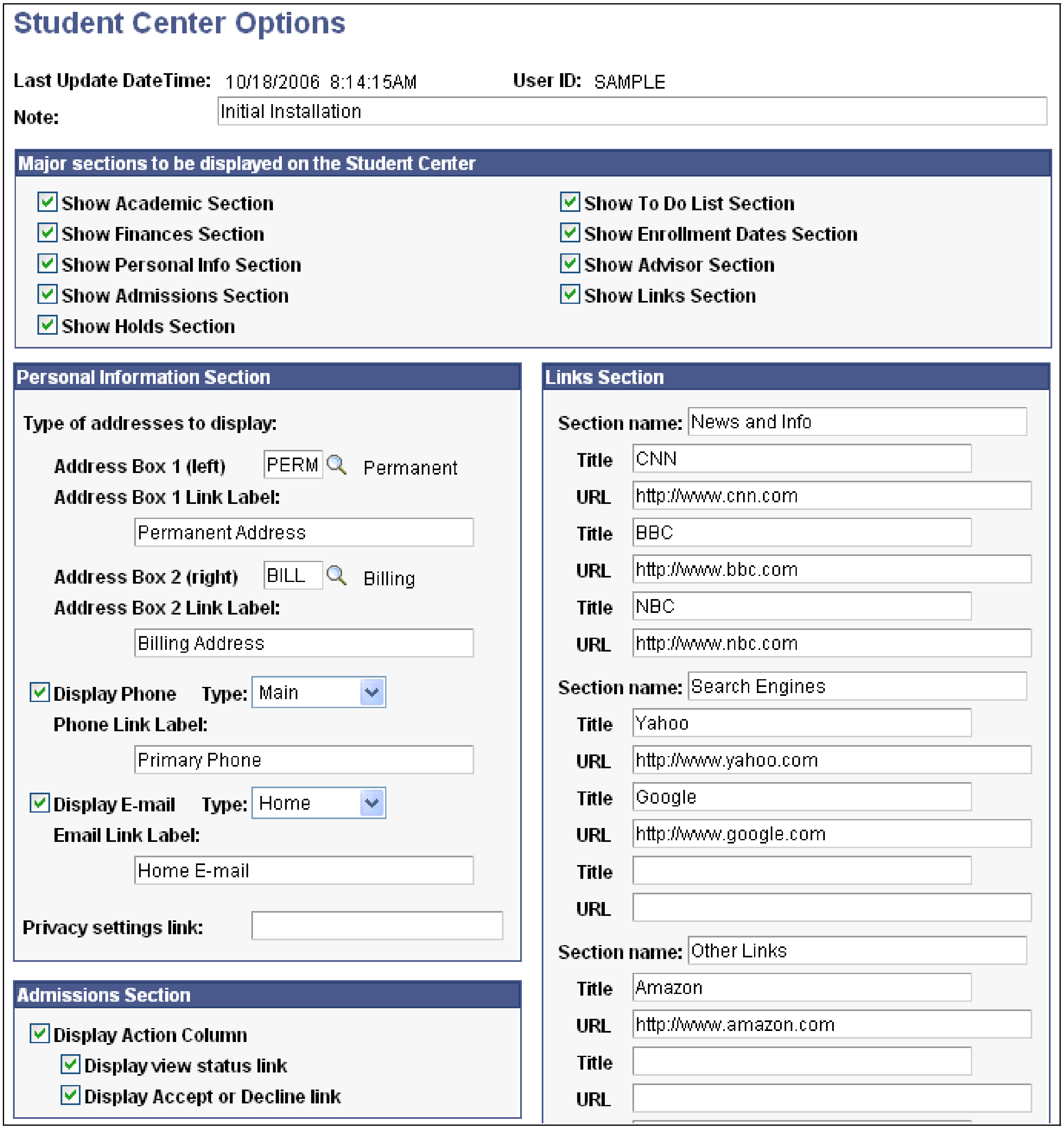
Using the Student Center Options page in conjunction with security setup, you can configure the Student Center page to control the user's experience. On the Student Center Options page, you can decide which major sections will appear on the Student Center page. You can also use the Student Center Options page to configure some of the individual items that will appear on the Student Center page. Using security setup, you can limit student access to self-service transactions. You must use the Student Center Options page in conjunction with security setup to create a self-service experience for students. For example, if your institution uses the enrollment functionality in PeopleSoft Student Records but does not use swap functionality, you can show the Academics section by selecting the Show Academic Section option on the Student Center Options page but not grant students access to the Swaps page using security. In this case, the Academic section would appear on the Student Center, but the swap functionality would not. Also, not displaying a feature on the Student Center does not remove it from the navigation. To remove a feature from the navigation, you must use security.

Page Used Set Up a Self-Service Center

Page Name	***Definition Name***	***Navigation***	***Usage***
Student Center Options	SSS_STDNCTR_OPT	Set Up SACR, Common Definitions, Self Service, Student Center	Define the sections that you want to appear to your students in the self-service Student Center.

Defining Self-Service Student Center Setup Options

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



Student Center Options

Last Update DateTime: 10/18/2006 8:14:15AM User ID: SAMPLE

Note: Initial Installation

Major sections to be displayed on the Student Center

- [x] Show Academic Section
- [x] Show Finances Section
- [x] Show Personal Info Section
- [x] Show Admissions Section
- [x] Show Holds Section
- [x] Show To Do List Section
- [x] Show Enrollment Dates Section
- [x] Show Advisor Section
- [x] Show Links Section

Personal Information Section

Type of addresses to display:

Address Box 1 (left) PERM Permanent

Address Box 1 Link Label:

Permanent Address

Address Box 2 (right) BILL Billing

Address Box 2 Link Label:

Billing Address

- [x] Display Phone Type: Main

Phone Link Label:

Primary Phone

- [x] Display E-mail Type: Home

Email Link Label:

Home E-mail

Privacy settings link:

Admissions Section

- [x] Display Action Column
  - [x] Display view status link
  - [x] Display Accept or Decline link

Links Section

Section name: News and Info

Title CNN

URL http://www.cnn.com

Title BBC

URL http://www.bbc.com

Title NBC

URL http://www.nbc.com

Section name: Search Engines

Title Yahoo

URL http://www.yahoo.com

Title Google

URL http://www.google.com

Title

URL

Section name: Other Links

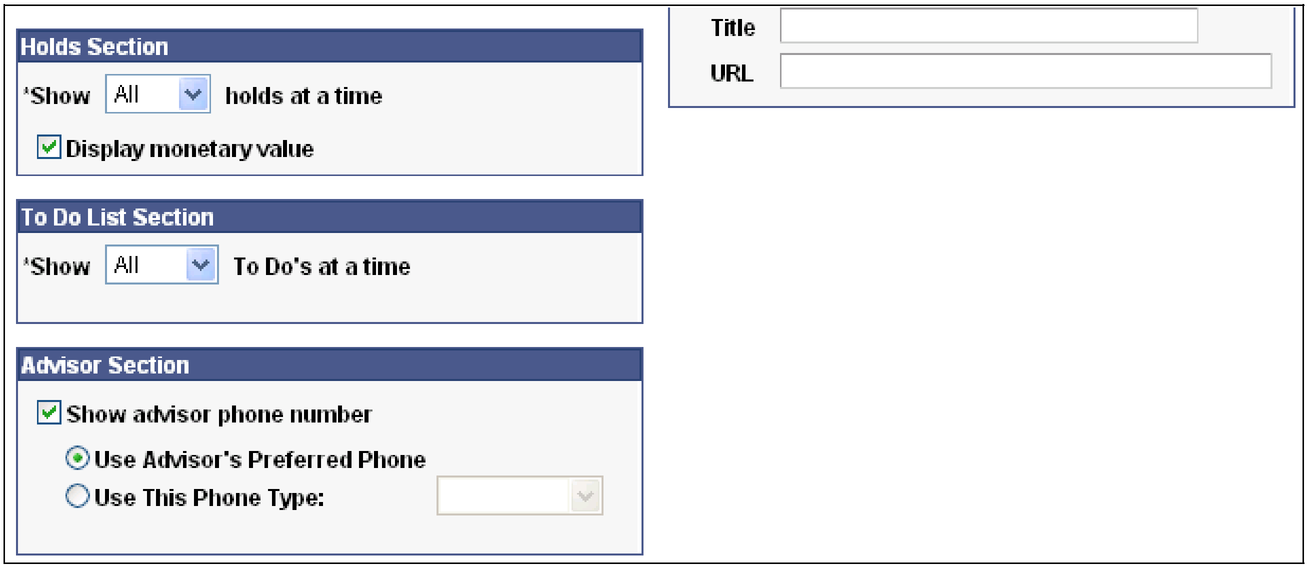
Title Amazon

URL http://www.amazon.com

Title

URL

Student Center Options page (1 of 2)



Student Center Options page (2 of 2)

Note Enter a note. This field is for informational purposes only.

Major Sections to Be Displayed on the Student Center

Show Academic Section Select to show the Academic Section on the self-service Student Center page. This section contains links to My Class Schedule, Wish List, enrollment, and other Student Records functionality.

Show Finances Section Select to show the Finances Section on the self-service Student Center page. This section contains links to PeopleSoft Student Financials and PeopleSoft Financial Aid functionality, such as Account Summary and View My Financial Aid.

Show Personal Info Section (show personal information section) Select to show the Personal Info Section on the self-service Student Center page. This section contains links to biographical information features, such as addresses, phone numbers, email address, emergency contacts, and user preferences. If you select this check box, the fields in the Personal Information Section group box become available for edit.

Show Admissions Section Select to show the Admissions Section on the self-service Student Center page. This section contains links to PeopleSoft Recruiting and Admissions functionality, such as applying to another academic program, requesting admissions information from your institution, or checking on the status of an application. If you select this check box, the fields in the Admissions Section group box become available for edit.

Show Holds Section Select to show the Holds Section on the self-service Student Center page. If you select this check box, the fields in the Holds Section group box become available for edit.

Show To Do List Section	Select to show the To Do List Section on the self-service Student Center page. If you select this check box, the field in the To Do List Section group box becomes available for edit.
Show Enrollment Dates Section	Select to show the Enrollment Dates Section on the self-service Student Center page. This section contains enrollment appointments, validation appointments, and open enrollment dates.
Show Advisor Section	Select to show the Advisor Section on the self-service Student Center page. This section displays academic advisors and committees assigned to the student. Within the Advisor Section, students click the Details link to go to the View My Advisors page.
Show Links Section	Select to show the Links Section on the self-service Student Center page. If you select this check box, the fields in the Links Section group box become available for edit.

Personal Information Section

Address Box 1 (left) and **Address Box 2 (right)**	Enter the address types to display in the Personal Information Section of the Student Center page. Only address types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.
Address Box 1 Link Label and **Address Box 2 Link Label**	Enter the label to be displayed for the address links on the Student Center page.
Display Phone	Select to display the student's phone number on the Student Center page.
Type	Enter a phone type to display. Only phone types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.
Phone Link Label	Enter the label to be displayed for the phone link on the Student Center page.
Display E-mail	Select to display the student's email address on the Student Center page.
Type	Enter email types to display. Only email types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.
Email Link Label	Enter the label to be displayed for the email link on the Student Center page.
Privacy settings link	If you do not use Family Educational Rights and Privacy Act (FERPA), enter a URL to your institution's privacy site. When you enter a URL in this field (starting with http://) a Privacy Settings link appears on the self-service Student Center page. It will direct users to the website you defined. If your institution uses FERPA, leave this field blank and give your self-service users access to the FERPA self-service page. In this case, users will access FERPA from the Personal Information prompt by selecting the Privacy Settings option.

Admissions Section

Display Action Column	Select to display the Action column in the Admissions section on the Student Center page. The Action column can display the What's missing link and the Accept/Decline link.
Display what's missing link	Select to display the What's missing link, which accesses the to-do list.
Display Accept or Decline link	Select to display the Accept or Decline link, which accesses the Accept Admissions page.

Holds Section

Show <> holds at a time	Select the number of holds that you want to display at one time. You can display all holds or from 1 to 10 holds. The system sorts holds by date—most current to oldest—on the Student Center page.
Display monetary value	Select to display the monetary value of the holds on the Student Center page.

To Do List Section

Show <> To Do's at a time	Select the number of to-do items that you want to display at one time. You can display all to-do items or from 1 to 10 to-do items. The system sorts to-do items by earliest due date on the Student Center page.

Advisor Section

Show advisor phone number	Select to indicate whether to use an advisor's preferred phone number or a particular phone type when displaying the advisor's phone number in the Advisor section of the Student Center. This setup controls the phone number on the Student Center page only. **Note.** You should select the same Advisor phone number value on this page and on the Other page in the Student Records component.

Links Section

Use this group box to define link sections that will be available on the Student Center page. By defining sections and URLs, you can provide links to institution websites such as University Library, Campus Directory, University Home Page, Free Application for Federal Student Aid (FAFSA), and others. You can define three sections with a maximum of three URLs per section.

Chapter 6

Setting Up Student Financials Self Service

This chapter discusses how to:

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

Prerequisites

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

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Business Units and *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing," Setting Up SF Merchants.

Setting Up Payment Merchants

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing," Setting Up Payment Merchants.

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

Setting Up SF Merchants

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing," Setting Up SF Merchants.

Setting Up Institution Sets

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

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

Understanding Institution Sets

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

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

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

See Also

PeopleSoft Enterprise Student Financials 9.0 PeopleBook, "Completing Student Financials General Setup," Setting Up Business Units

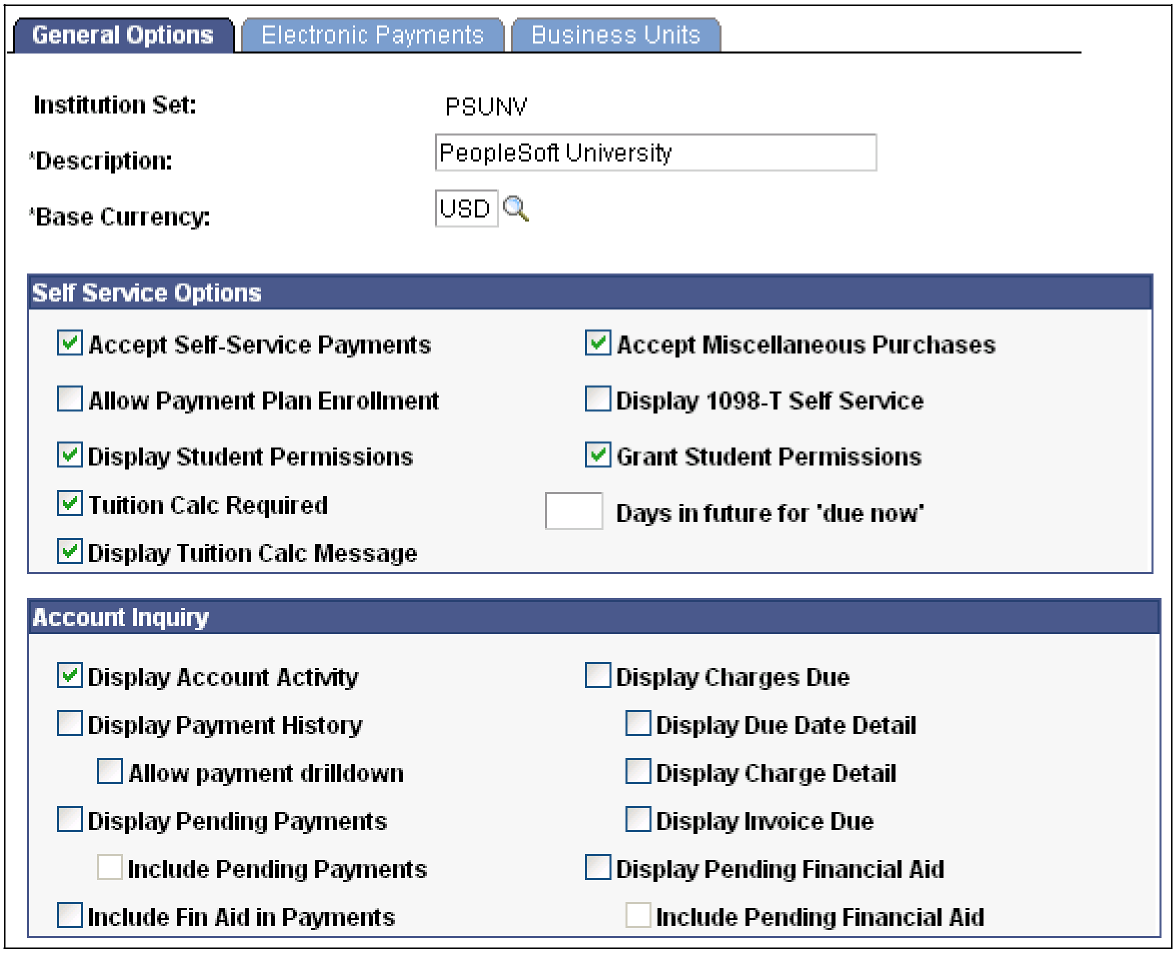
PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Creating and Maintaining User Profiles"

Pages Used to Set Up Institution Sets

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

Defining Basic Institution Set Parameters

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



General Options page

The selections made in the Self Service Options and Account Inquiry group boxes determine what students see in the Make a Payment self-service component (SSF_SS_PAYMENT). For instance, if you clear the Display Pending Financial Aid check box, then the student's anticipated aid does not appear anywhere in the Make a Payment component of self service.

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

Self Service Options

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

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

Allow Payment Plan Enrollment	Select to allow students to enroll in payment plans. This flag controls whether the Payment Plan option appears in the Other Financial drop-down list in Student Center and whether the link appears at the bottom of the Account Inquiry page.
Display 1098–T Self Service	Select to display and to allow access to the 1098-T Self Service option for students in this institution set. This check box controls whether the 1098-T option appears in the other financial drop-down list box in Student Center and whether the link appears at the bottom of the Account Inquiry page.
Display Student Permissions	U.S. Department of Education regulations require that federal financial-aid awards be used to pay only allowable charges for the period of enrollment covered by the aid year in which those funds were awarded. Regulations require schools to collect individual authorization from a student to allow funds to pay for nonallowable charges such as library fines and parking fees or for charges for the prior year immediately preceding the current aid year. Select to allow access to the Grant Student Permissions option for students in this institution set. The student cannot revoke permission using Self Service; only the administrator can do this.
Grant Student Permissions	Select to display and to allow access to the Grant Permissions option for students in this institution set. This check box appears only if the Display Student Permissions check box is selected.

Tuition Calc Required (tuition calculation required)

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

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

  See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up Tuition Controls, Criteria, Equations, and Waivers," Specifying Tuition Calculation Parameters.

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

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

Display Tuition Calc Message

Select to display the following tuition calculation messages for students:

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

Days in future for 'due now'

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

Example of How the Days in Future Field Is Calculated

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

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

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

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

Account Inquiry

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

Display Account Activity

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

Display Charges Due	Select to display the Charges Due page. Four grids are displayed on this page, three of which are optional: Display Due Date Detail,Display Charge Detail, and Display Invoice Due. The Display Charges Due grid rolls up all charges by unique due date to be presented as a summary to the student. The Display Due Date Detail grid displays the details of all charges rolled up by unique due date. The Display Charge Detail grid displays the details of each charge. On this grid, the student has the opportunity to look deeper into charges containing multiple due dates. The Display Invoice Due grid display details of charges by billing invoice ID date.
Display Payment History	Select to display the Payments page. You can also choose to allow payment drilldown. For any successfully posted payments, the student can see which charges were reduced by those payments if the Allow payment drilldown check box is selected.
Display Pending Payments	Select to display the student's pending payments on the following pages: Account Inquiry - Account Summary tab: What I Owe grid. Account Inquiry - Payments tab: Pending Payments grid. If this check box is cleared, then the student's pending payments do not appear anywhere in self service.
Include Pending Payments	If this check box is selected, then the student's balance is reduced by the pending payment amount. This check box must be used in conjunction with the Display Pending Payments check box for the remaining balance amount to be reduced by any pending payments made. If this check box is selected, the total due amount is reduced by the pending payment amount on the Account Inquiry - Account Summary tab: What I Owe grid. If this check box is cleared, then the total due amount is not reduced by the pending payment amount on the Account Inquiry - Account Summary tab: What I Owe grid. The remaining balance amount is not reduced by the pending payment amount.
Display Pending Financial Aid	Select to display anticipated aid as a line item on the Account Inquiry - Account Summary tab: What I Owe grid and the Account Inquiry - Pending Financial Aid page. If this check box is selected, anticipated aid appears on the pages as a line item only and does not reduce the remaining balance amount. Students are informed of any anticipated aid, but their total charges are not reduced by the anticipated aid. If this check box is cleared, then the student's anticipated aid does not appear anywhere in the Account Inquiry self-service component (SSF_SS_ACCT_SUMM).

Include Pending Financial Aid	If this check box is selected, the student's balance is reduced by the anticipated aid amount. This check box must be used in conjunction with the Display Pending Financial Aid check box for the remaining balance amount to be reduced by any anticipated aid. If this check box is selected, the total due amount is reduced by the anticipated (or pending financial) aid amount on the Account Inquiry - Account Summary tab: What I Owe grid. If it is cleared, then the total due amount will not be reduced by the anticipated aid amount on the Account Inquiry - Account Summary tab: What I Owe grid. The remaining balance amount is not reduced by the pending financial aid amount.
Include Fin Aid in Payments (include financial aid in payments)	Select to include financial aid disbursements with all other payments. If this check box is cleared, financial aid disbursements appear in a separate financial aid activity line on the Payment History page. If your institution does not disburse financial aid, select this option to eliminate financial aid activity lines.

Defining Self-Service ePayments for Institution Sets

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

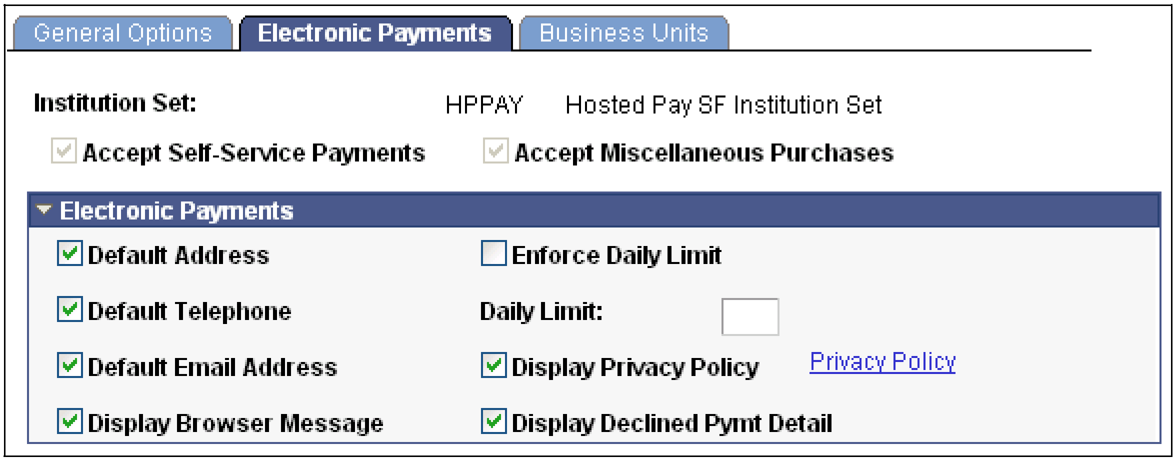
If you use Integration Broker, it supports the capture of the Security Code. Capturing this code lowers your transaction costs and increases fraud deterrence on card not present transactions.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing."

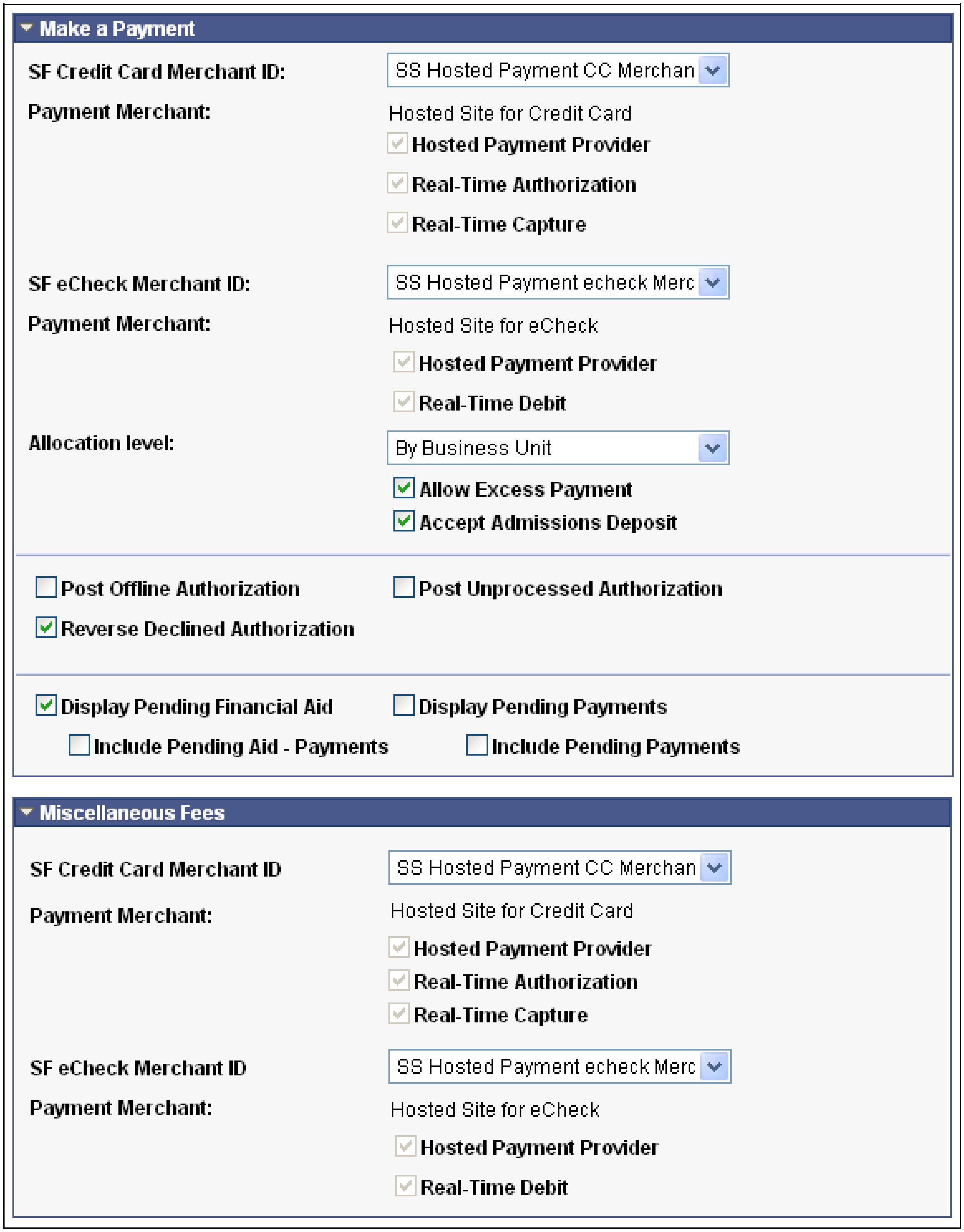
See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Processing ePayment Transactions."

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

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



Electronic Payments page (1 of 2)



Electronic Payments page (2 of 2)

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

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

Accept Self Service Payments

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

Accept Miscellaneous Purchases

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

Electronic Payments

Default Address

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

Default Telephone

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

Default Email Address

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

Display Browser Message

Select this check box:

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

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing," Defining Electronic Payment Merchants.

Enforce Daily Limit and **Daily Limit**

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

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

Display Privacy Policy

Select to display the Privacy Policy link on the Make a Payment - Confirm Payment page if a school uses the hosted payment feature and on the Make a Payment - Specify Payment Details page if the school does not use the hosted payment feature.

The privacy policy is optional and user defined.

Privacy Policy

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

Make a Payment

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

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

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

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

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

Payment Merchant

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

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

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

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

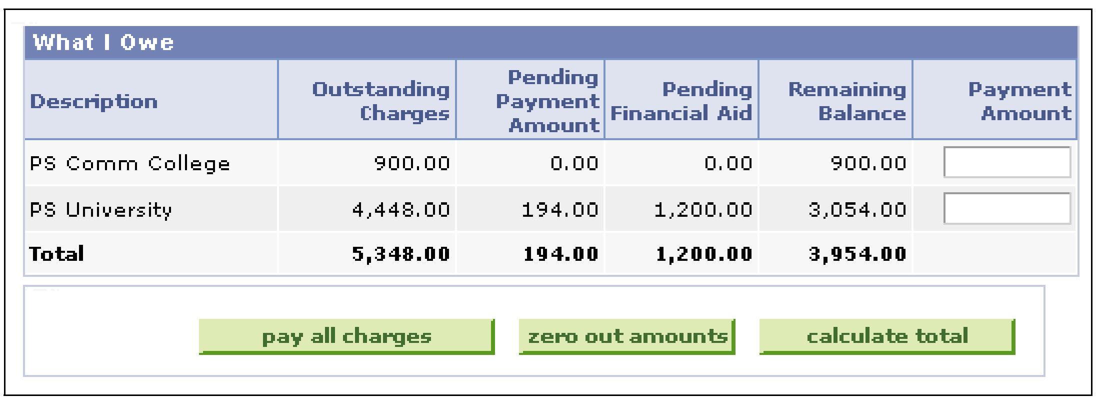
See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing."

Allocation Level

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

Allocation Level By Business Unit

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



What I Owe

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

Allocation Level By Business Unit page (1 of 2)

▽ My Charges

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

Currency used is US Dollar.

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

Allocation Level By Business Unit page (2 of 2)

Allocation Level by Charge

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

PS Comm College

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

pay charges | zero out amounts | calculate grand total

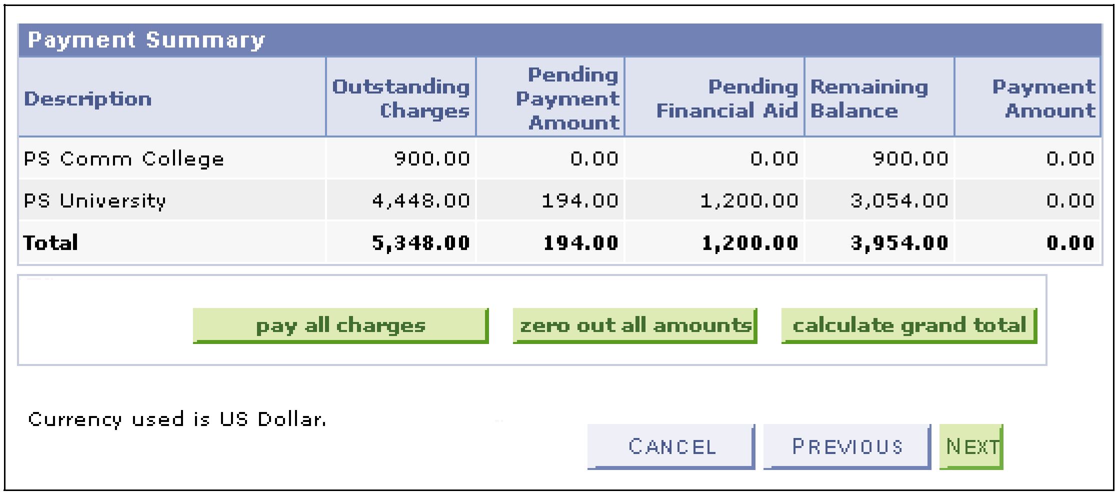
Currency used is US Dollar.

PS University

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

pay charges | zero out amounts | calculate grand total

Allocation Level by Charge page (1 of 2)



Payment Summary

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

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

Currency used is US Dollar.

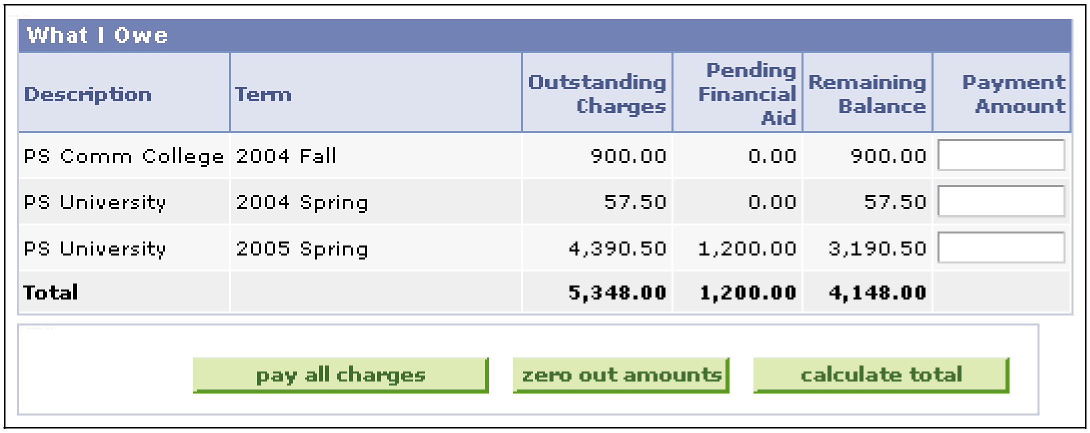
CANCEL | PREVIOUS | NEXT

Allocation Level by Charge page (2 of 2)

Allocation Level by Term

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

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



What I Owe

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

pay all charges | zero out amounts | calculate total

Allocation Level by Term page (1 of 2)

My Charges

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

Currency used is US Dollar.

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

Allocation Level by Term page (2 of 2)

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

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

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

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

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

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

Reverse Declined Authorization

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

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

Display Pending Financial Aid

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

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

Include Pending Aid – Payments

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

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

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

Display Pending Payments

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

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

Include Pending Payments

If this check box is selected, then the student's balance is reduced by the payment amount. This check box must be used in conjunction with the Display Pending Payments check box for the remaining balance amount to be reduced by any payments made.

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

Miscellaneous Fees

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

SF Credit Card Merchant ID and SF eCheck Merchant ID

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

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

Payment Merchant

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

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

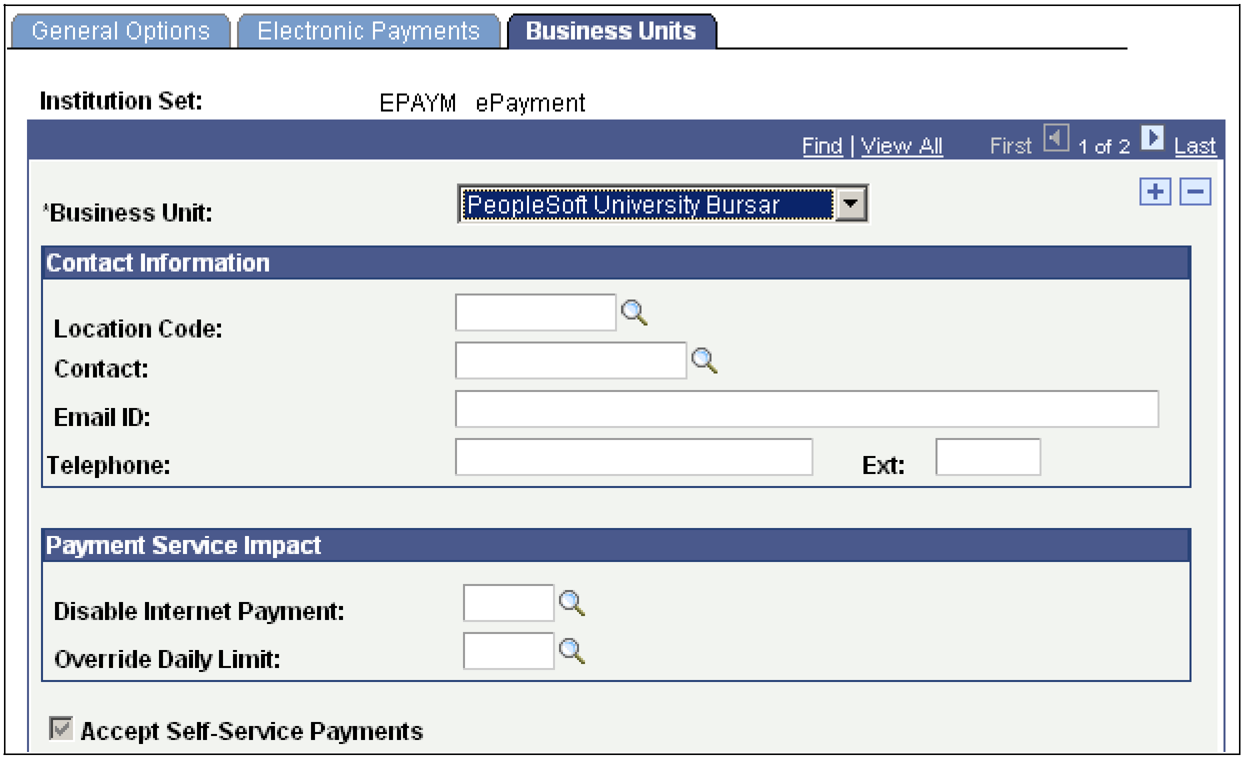
You can, however, use Business Interlink for one payment method and Integration Broker for another. (For credit cards, Security Code is supported only by Integration Broker).

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

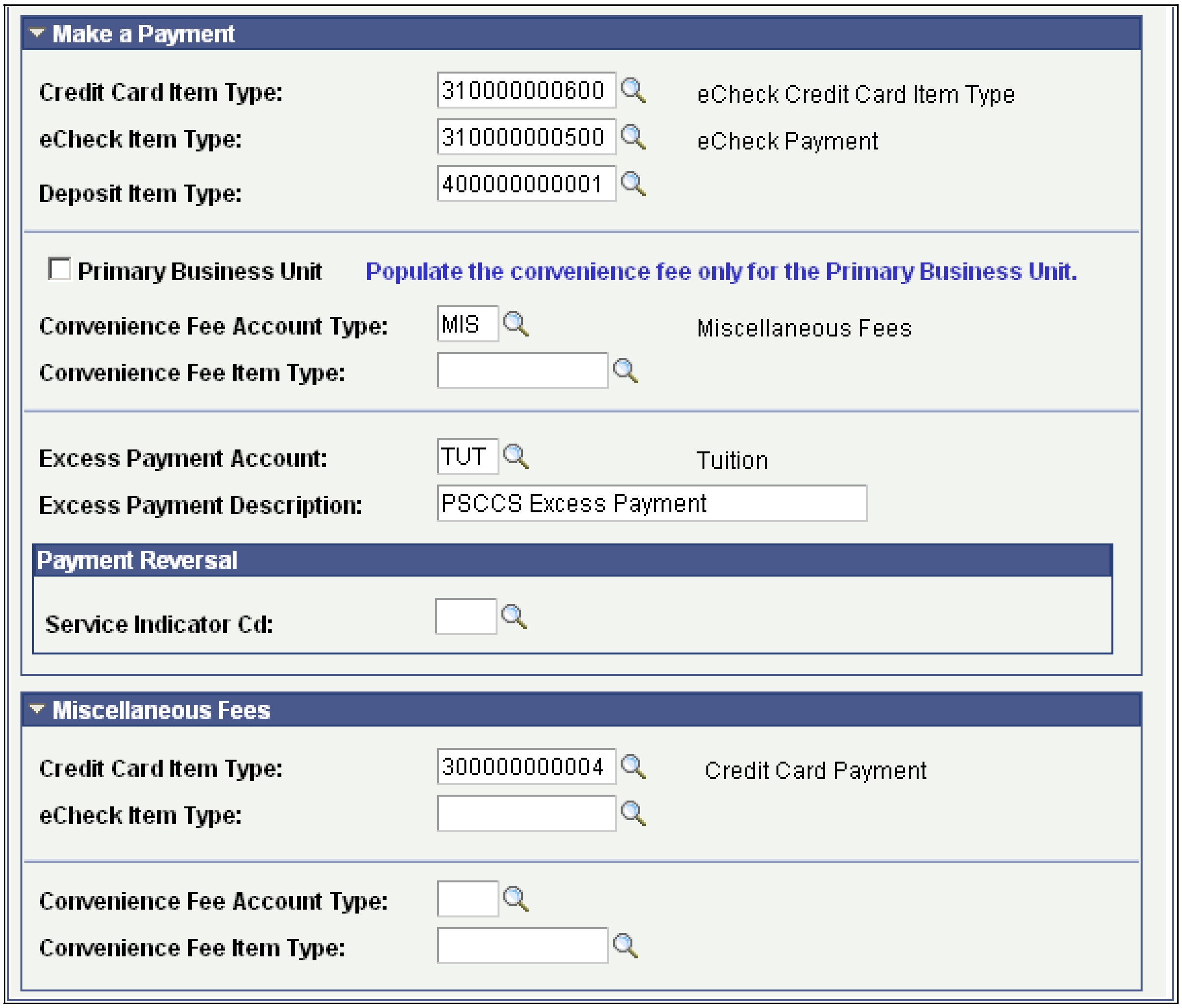
See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing."

Defining Self-Service Business Units for Institution Sets

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



Business Units page (1 of 2)



Business Units page (2 of 2)

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

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

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

Contact Information

Location Code

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

Contact

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

Email ID

Enter the email address of the contact person.

Telephone

Enter the telephone number of the contact person.

Ext (extension)

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

Payment Service Impact

Disable Internet Payment

Select the negative service impact code that the system uses to disable a customer's ability to pay on the internet using a credit card. If the student has this impact on his account, he will be unable to access the Make a Payment page.

Override Daily Limit

Select the positive service impact code that the system uses to enable customers to bypass the daily limit for credit card payments. If a student has this impact on his account, he will be able to make credit card payments in excess of the daily limit.

Accept Self-Service Payments

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

Make a Payment

Credit Card Item Type

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

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

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eCheck Item Type

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

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Item Types and Item Type Groups.

Deposit Item Type

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

Primary Business Unit

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

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

Convenience Fee Account Type

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

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Item Types and Item Type Groups.

Convenience Fee Item Type

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

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Item Types and Item Type Groups.

Excess Payment Account

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

Excess Payment Description

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

Payment Reversal

Service Indicator CD

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

Miscellaneous Fees

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

Credit Card Item Type

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

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

eCheck Item Type

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

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Item Types and Item Type Groups.

Convenience Fee Account Type

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

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Item Types and Item Type Groups.

Convenience Fee Item Type

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

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

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Item Types and Item Type Groups.

Setting Up Self-Service Options

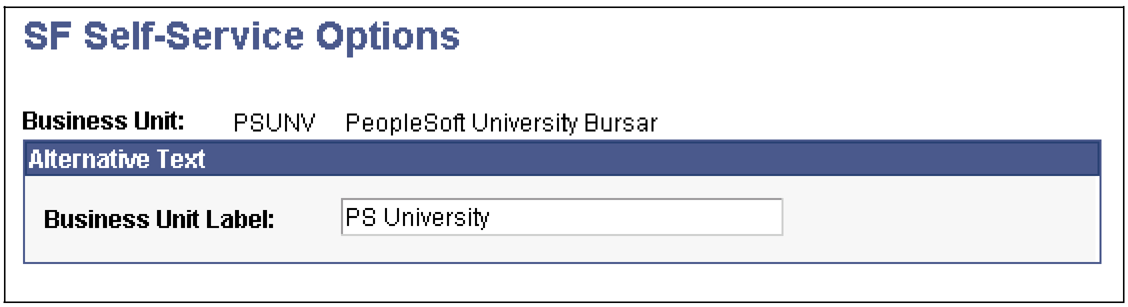
This section discusses how to define business unit labels.

Page Used to Set Up Self-Service Options

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

Defining Business Unit Labels

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



SF Self Service Options page

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

Setting Up Miscellaneous Fees

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

This section discusses how to:

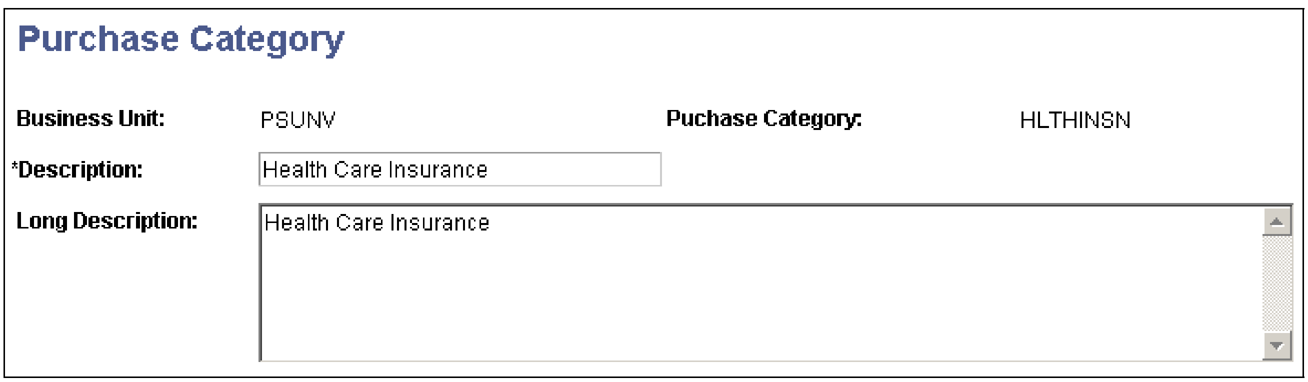
- Set up a purchase category.
- Set up purchase items.
- Enable self-service miscellaneous purchases.

Pages Used to Set Up Miscellaneous Fees

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

Setting Up a Purchase Category

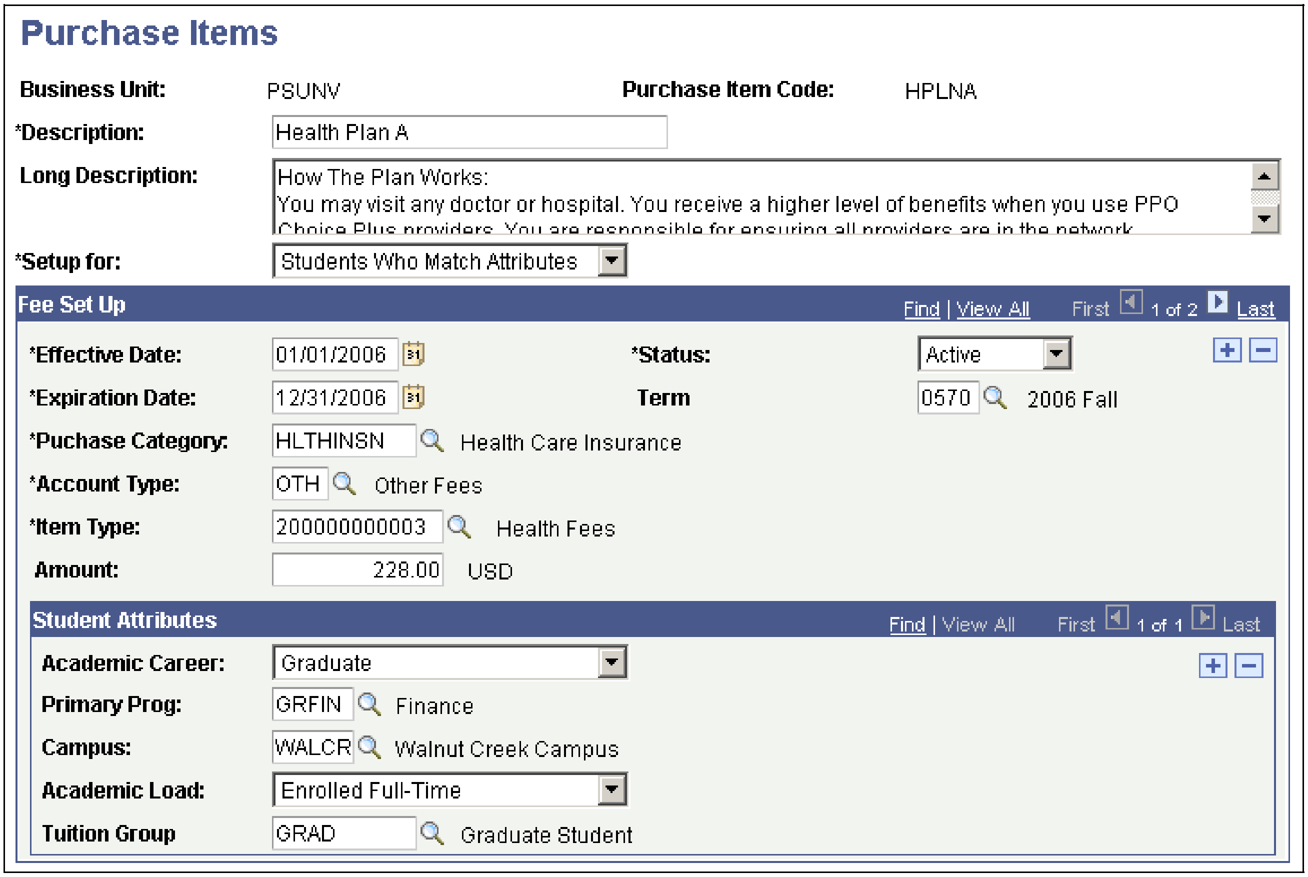
Access the Purchase Category page (Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Category).



Purchase Category page

Setting Up Purchase Items

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



Purchase Items page

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

Setup for

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

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

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

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

Fee Set Up

Effective Date

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

Status

Active or *Inactive.*

Expiration Date

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

Term

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

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

Purchase Category

Select a purchase category.

Account Type

Use to classify the charge item type.

Item Type

Define an item type for the charge.

Amount

Enter the amount to be charged for the item.

Student Attributes

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

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

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

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

Enabling Self-Service Miscellaneous Purchases

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

See Chapter 6, "Setting Up Student Financials Self Service," Setting Up Institution Sets, page 38.

See Chapter 6, "Setting Up Student Financials Self Service," Pages Used to Set Up Institution Sets, page 39.

Chapter 7

Setting Up Financial Aid Self-Service

This chapter provides an overview of PeopleSoft Campus Self Service for financial aid and discusses how to:

- Set up self-service inquiry options.
- Set up reporting of external awards.
- Set up self-service awarding options.
- Set up FE FAN view and print options.
- Set up lender selection.
- Set up loan counseling.
- Set up self-service actions and access in packaging.
- Modify self-service loan status descriptions.
- Create user-defined text.

Understanding Campus Self Service for Financial Aid

Financial Aid self service enables students to view financial aid information and take necessary action. Students can report awards they earned from sources external to the financial aid office. They can accept, decline, and reduce award amounts and then print the Financial Award Notification (FAN). After accepting an award, a student can select a lender to secure the loan and then fulfill loan counseling requirements. Students can also request a change to their financial aid, cancel their aid, or request a meeting through the Request Counselor Action feature.

Students can view a summary of and detailed information about their financial aid for a specific aid year, which includes:

- Estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need.
- Type of award and the offered and accepted amount for each term within the aid year.
- Loan application status, loan amount, loan fee, net amount, scheduled disbursement data, and lender information.

Setting Up Self-Service Inquiry Options

To set up self-service options, use the Self Service Options component (SS_FA_INSTALL).

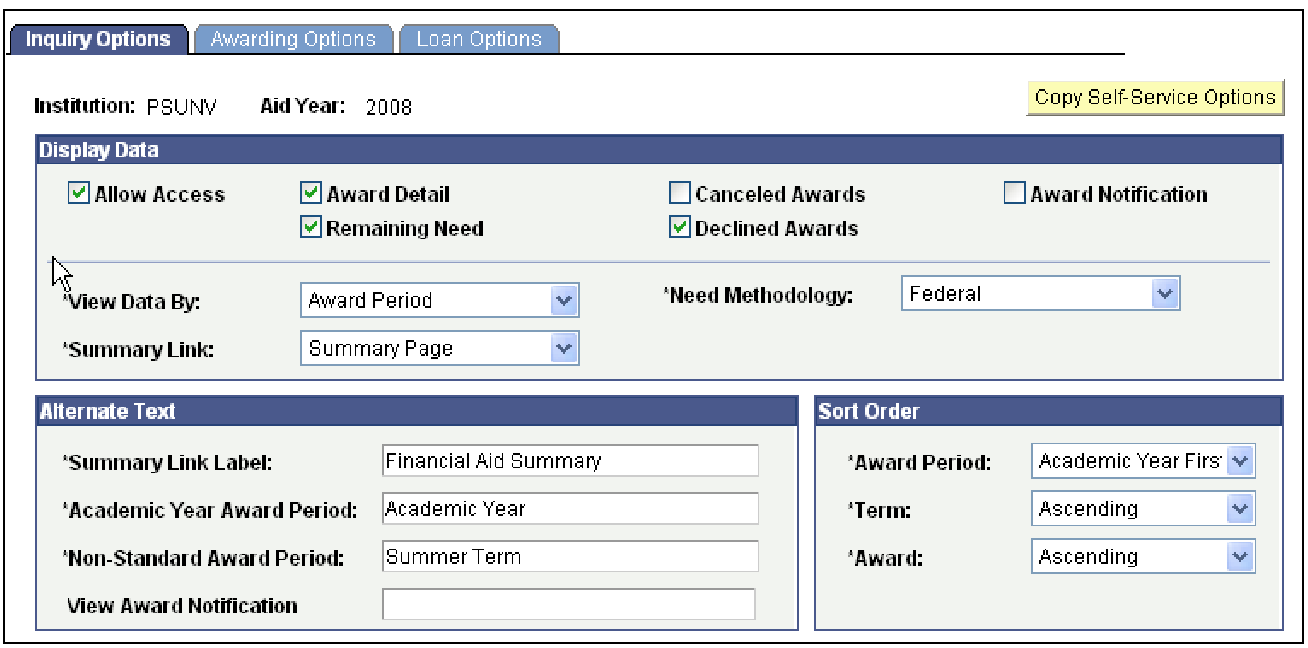
This section discusses how to define self-service options.

Page Used to Set Up Self-Service Inquiry Options

Page Name	***Definition Name***	***Navigation***	***Usage***
Inquiry Options	SS_FA_INSTALL	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options	Define self-service options. Set up information that you want available for students to view.

Defining Self-Service Options

Access the Inquiry Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options).



Inquiry Options page

Use this page to define financial aid elements that students can view online.

Display Data

Allow Access

Select to allow students to view and make decisions about their awards for your institution and aid year in self service. If you clear the check box, students cannot access the self-service inquiry and award package pages for the corresponding year. For example, if the awards are in transition or not ready for viewing, you can clear the check box to prevent all students from viewing their awards.

Note. Use the Inquiry Access check box and the Award Access field on the Financial Aid Status page to set access at the individual student level. If you clear the Inquiry Access check box, the student cannot access the inquiry pages. However, if you select the Inquiry Access check box and also select the Allow Access check box on the Self Service Options page, the student can access the inquiry pages. Similarly, if you set the Award Access field to *Allowed* and select the Allow Access check box on the Inquiry Options page, the student can access the self-service award pages. The administrative user can set these fields in batch.

Award Detail

Select to display the Financial Aid Award Summary page. If you clear the check box, the student sees the Financial Aid - Self Service Links page.

Remaining Need

Select to display the student's remaining need on the Financial Aid - Financial Aid Eligibility page.

Canceled Awards

If you select this check box and the student has a canceled award, the system activates the View Canceled Awards link on the Financial Aid - Award Summary page.

Award Notification

Select to display the FE Award Notification PDF link on the student's Financial Aid -Award Summary page and Financial Aid -Award Package page.

Declined Awards

If you select this check box and the student has a declined award, the system activates the View Declined Awards link on the Financial Aid - Award Summary page.

View Data By

Select from:

Aid Year: Displays the entire aid year across award periods.

Award Period: Displays aid year information by the award period for academic and nonstandard periods.

Summary Link

Provides access to view estimated financial aid budget, expected family contribution, estimated need, total aid, remaining need, or user-defined text.

Select from:

COA Detail Only: Displays estimated financial aid budget detail.

Do Not Show Link: Does not display link.

Summary Page: Displays the Financial Aid - Financial Aid Eligibility page. Students can view estimated financial aid budget, expected family contribution, estimated need, total aid, remaining need, and user-defined text.

User-defined Page: Displays user-defined text.

Need Methodology	Select from: *Federal:* Displays estimated financial aid budget and expected family contribution (EFC) values based on federal methodology. *Institutional:* Displays estimated financial aid budget and EFC values based on institutional methodology.

Alternate Text

Summary Link Label	Enter a name for this link. The text that you enter here is the name of the link that appears on the Financial Aid - Award Summary page and the title of the Financial Aid - Aid Year Summary page.
Academic Year Award Period	Enter text such as *Academic Year 2005.* The system displays this text when referring to this specific award period on self-service pages such as the Financial Aid - Award Summary and Financial Aid - Expected Family Contribution pages.
Non-Standard Award Period	Enter text such as *Summer.* The system displays this text when referring to this specific award period on self-service pages such as the Financial Aid - Expected Family Contribution page.
View Award Notification	Enter a name for the link on the Financial Aid - Award Summary and Financial Aid - Award Summary pages. This link enables students to view and print their award letter and notification.

Sort Order

Award Period

Note. The system displays this field only if you set the View Data By field to *Award Period.*

Select from:

Academic Year First: Displays academic year data first and then nonstandard period data.

Earliest Period First: Displays the award period into which the student's earliest term falls. For example, if a student has awards for both Summer 2004 (nonstandard) and Fall 2004 (academic year), and these terms are part of the same aid year, then the nonstandard period is displayed first.

Latest Period First: Displays the award period into which the student's most recent term falls. For example, if a student has awards for both Summer 2004 (nonstandard period) and Fall 2004 (academic year), and these terms are part of the same aid year, then the academic year period is displayed first.

Non-standard Period First: Displays the nonstandard period first.

Note. If the student has awards in only one award period, the system displays whichever award period contains awards. If the student has awards in both periods, the system uses the Award Period sorting option to determine which period to display first.

Term

Select from:

Ascending: Sorts from lowest term ID to highest and therefore displays the most recent term last.

Descending: Sorts from highest term ID to lowest and therefore displays the most recent term first.

Award

The system sorts awards by item type. Select from the following financial-aid item type sequence:

Ascending: 9..100 first, 9..322 last.

Descending: 9..322 first, 9..100 last.

Copy Self Service Options

Click to copy financial aid self-service options from this institution and aid year to another.

Setting Up Reporting of External Awards

This section discusses how to:

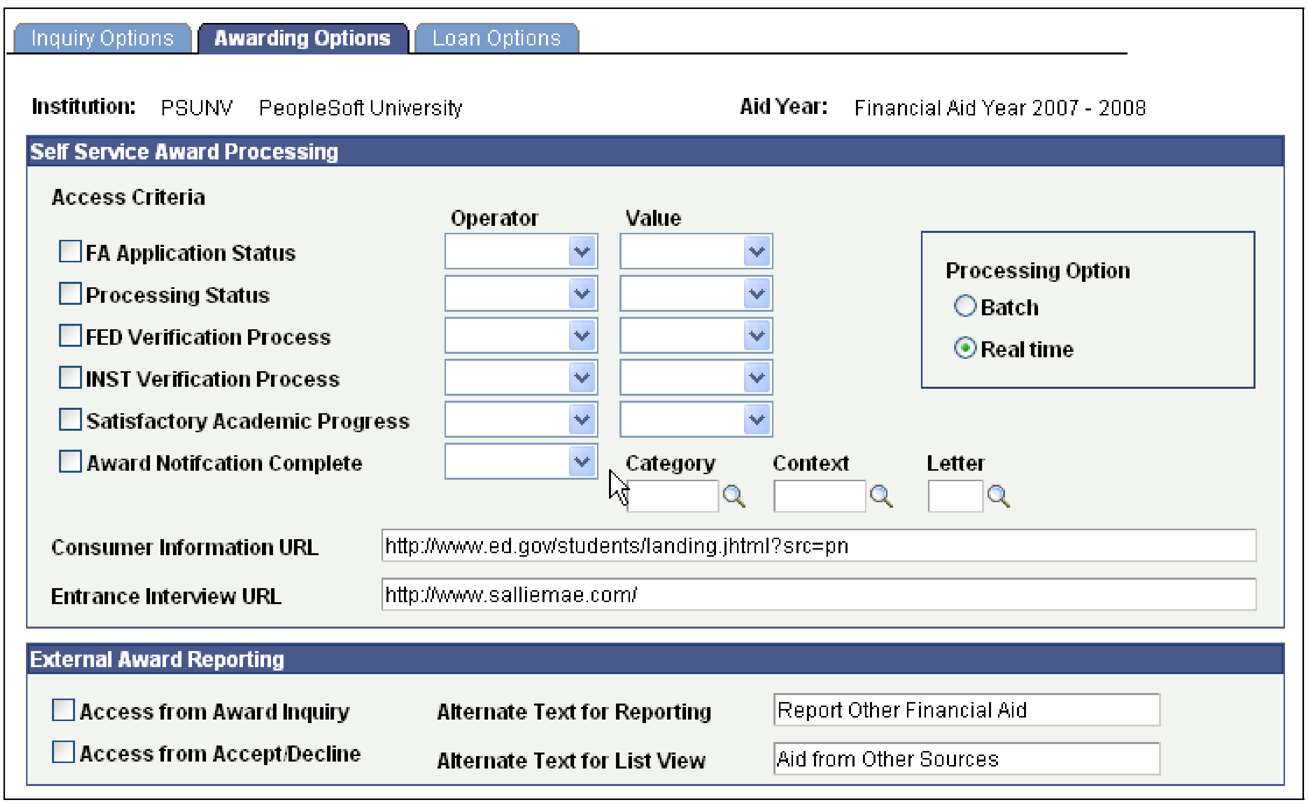
- Display external award reporting on self-service pages.
- Enable student access to reporting of external awards.

Pages Used to Set Up Reporting of External Awards

Page Name	***Definition Name***	***Navigation***	***Usage***
Awarding Options	SS_FA_INSTALL2	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options	Enable student access from the Award Inquiry page or the Accept/Decline pages. Optionally add instructional text for reporting or viewing.
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary, Packaging Status Summary	Set access to External Award reporting on student self-service pages.

Displaying External Award Reporting on Self-Service Pages

Access the Awarding Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options).



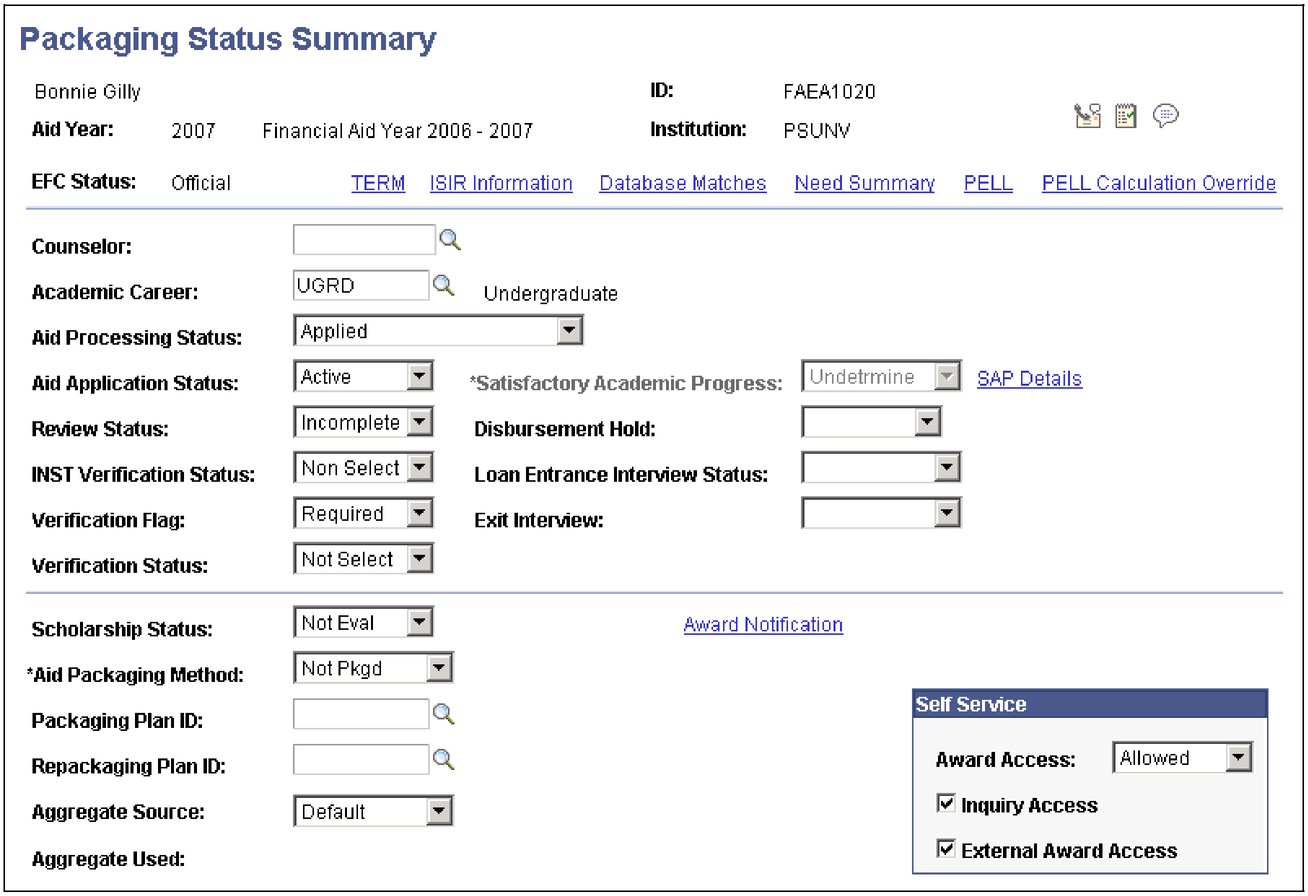
Awarding Options page

External Award Reporting

Access from Award Inquiry	Select to display a link to the Report Aid from Other Source component on the students' Award Inquiry Self Service pages.
Access from Accept/Decline	Select to display a link to the Report Aid from Other Source component on the students' Accept Award and Decline Award Self Service pages.
Alternate Text for Reporting	Enter text that will be used as the link from the Award Inquiry and Accept/Decline page.
Alternate Text for List View	Enter text to use as the page title for a student to report aid from an external source.

Enabling Student Access to Reporting of External Awards

Access the Packaging Status Summary page (Financial Aid, View Packaging Status Summary, Packaging Status Summary).



Packaging Status Summary page

For each student, set the access to External Award reporting.

Self Service

Award Access Select from *Allowed, Denied,* and *Use Filter.*

Inquiry Access Select to enable student access to award information.

External Award Access Select to enable student access to the External Award reporting component.

Setting Up Self-Service Awarding Options

To set up self-service awarding options, use the Self Service Options component (SS_FA_INSTALL).

This section discusses how to set up self-service awarding.

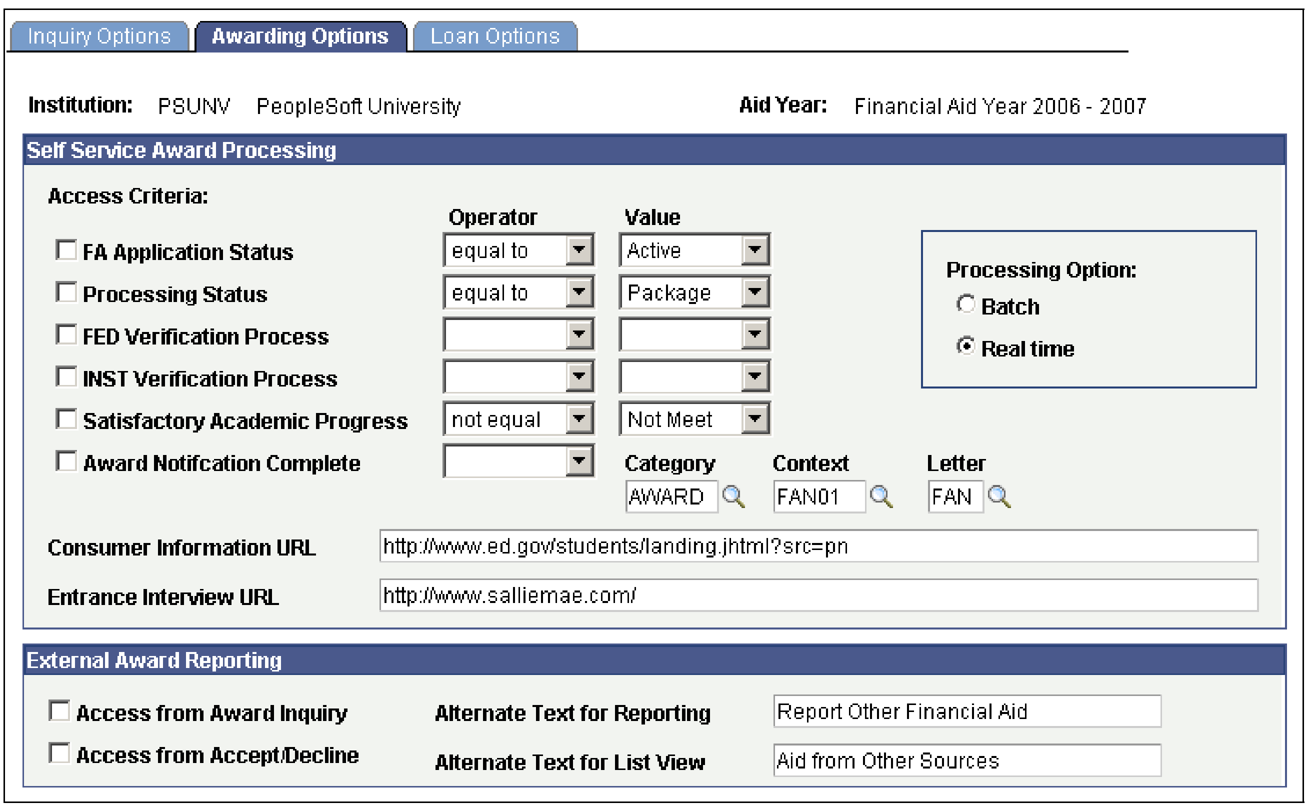
Page Used to Set Up Self-Service Awarding Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Awarding Options	SS_FA_INSTALL2	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options	Define filter options for self-service awarding access criteria. Set up processing options and Consumer and Entrance Interview URLs. Also, define the authentication method and number of required references for the Perkins eMPN.

Setting Up Self-Service Awarding Options

This section discusses how to define access criteria, the different processing options, and the site-definable URLs for self-service awarding.

Access the Awarding Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options).



Awarding Options page

Self Service Award Processing

One way to control when a student gains access to the self-service awarding page is through the use of filtering. If you do not select the check box, then the system does not consider it as part of the access criteria.

Access Criteria

When setting a value for an access criteria, select an operator of either *equal to* or *not equal.*

FA Application Status (Financial Aid application status)	Select to allow self-service awarding access based on the student having an active financial aid application.
Value	Select *Active,Canceled,* or *Restricted.*
Processing Status	Select to allow self-service awarding access based on the student's processing status.
Value	Select *Applied,Completed,No App Rcd,Package,* or *Review.*
FED Verification Process (federal verification process)	Select to allow self-service awarding access based on the student's federal verification status.
Value	Select *Complete,Not Reqd,Pending,* or *Required.*
INST Verification Process	Select to allow self-service awarding access based on the student's institutional verification status.
Value	Select *Complete* or *Incomplete.*
Satisfactory Academic Progress	Select to allow self-service awarding access based on the student having met your institution's criteria for satisfactory academic progress.
Value	Select *Meets SAP,Not Meet,Probation,* or *Undetrmine.*
Award Notification Complete	Select to allow self-service awarding access based on whether a financial-aid award notification letter has been generated for the student.
Category	Select an option: *Appeal:* FA Appeals *Award:* Financial Aid Award Notification *SAT:* Satisfactory Academic Progress Letters *SCHLRS:* Scholarship Communications *VERF:* Verification Processing

Context

Select a type of communication. The system uses the same criteria when generating the FAN letter.

Letter

Select a type of communication. The system uses the same criteria when generating the FAN letter.

Note. You use these criteria options in conjunction with the *Use Filter* award access option on the Packaging Status Summary page.

Processing Option

This option controls whether students' decisions regarding their awards will be processed in real time or in batch. If you select the default value of *Batch,* the system loads the current award package from the real tables to a staging table. It saves the student's activity to the staging table when the student submits an award acknowledgment. The system sets the student's transaction to Pending Update and records the current date and time. When you run the batch process, the system selects all transactions with a Pending Update status for processing. For each student selected, as long as the financial aid package has not been revised since the student submitted the award acknowledgment, the system checks each award in the student's package for any changes. It evaluates changed awards to ensure that award amounts and disbursement balances are correct and reductions do not fall below minimum amounts. The system processes all other awards in passive mode. After the batch validation process has finished and if no errors were found, the system posts the data to the student's real award tables in the database.

If you select *Real time,* the system loads the current award package from the real award tables to a staging table. It saves the student's activity to the staging table when the student submits an award acknowledgment. The system evaluates the award activity and the resulting changes as it does in batch mode. The process verifies the Accept or Decline amount, and for award reductions, recalculates the scheduled disbursements. When all of the awards in the student's package are processed and if no errors were found, the system posts the data to the student's real award tables in the database.

Note. Unlike administrative packaging for which the packaging routine performs extensive edits to ensure the validity of an award, in self-service the system processes awards in passive mode and does not perform any federal edits or evaluate the student for eligibility or need criteria. The system performs a subset of edits on any award that is being reduced. Also, the system adjusts an award that has been reduced below minimum amounts established for the system.

Consumer Information URL

If you complete this field, the system displays a link in self-service awarding. If you leave this field blank, the system does not display a link. Enter your institution's student information site. This site may reflect awarding rights and responsibilities such as statement of educational purpose, truth-in-lending content, or other financial aid information.

Entrance Interview URL	Enter your institution's entrance and exit interview site to display a link in self-service awarding. If you leave this blank, the system does not display a link. If you use Self Service Loan Counseling and enter entrance and exit interview URLs on the Loan Counseling page, leave this field blank, or both URLs will appear.

External Award Reporting

Access from Award Inquiry	Select to display a link on the students' Award Inquiry Self Service pages.
Access from Accept/Decline	Select to display a link on the students' Accept Award and Decline Award Self Service pages.
Alternate Text for Reporting	Enter instructions to the student that varies from the default text.
Alternate Text for List View	Enter instructions to the student that varies from the default text.

Setting Up FE FAN View and Print Options

Students can view and print their Forms Engine (FE) financial aid notification letter (FANLTR) in self-service if you display the links on their Award Summary and Award Package pages.

Prerequisites

Before a student can print an FE FAN letter from Self Service, either GhostView or Adobe Distiller must be installed to format the PDF.

Pages Used to Set Up FE FAN View and Print Options

Page Name	*Definition Name*	*Navigation*	*Usage*
FE Award Notification Defaults	FANLTR_DEFAULTS	Financial Aid, Awards, Notification Letter, Award Notification Defaults	Ensure that the Display NID check box is not selected to avoid printing U.S. students' Social Security Numbers on their FAN letters. Select the Print Cancels and Print Declines check boxes to show links to canceled or declined awards.

Page Name	***Definition Name***	***Navigation***	***Usage***
Inquiry Options	SS_FA_INSTALL	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options	Select the Award Notification check box in the Display Data group box to display the FE Award Notification PDF link on the students' Award Summary and Award Detail pages. Enter a name for the link to the FE Award Notification PDF process in the View Award Notification field in the Alternate Text group box.
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Select *Print* from the Print Letter Option drop-down list box.

Setting Up Lender Selection

To set up lender selection for the student, activate the display on the Loan Options page and ensure that the preferred lenders are set up. You might have set up lenders while processing FFELP loans.

This section discusses how to:

- Display lender selection.
- Define self-service lenders.

See Also

PeopleSoft Enterprise Financial Aid 9.0 PeopleBook, "Setting Up Common Record CommonLine (CRC)," Setting Up Loan Origination for CRC

PeopleSoft Enterprise Financial Aid 9.0 PeopleBook, "Setting Up CommonLine 4 Loans," Setting Up Loan Participants

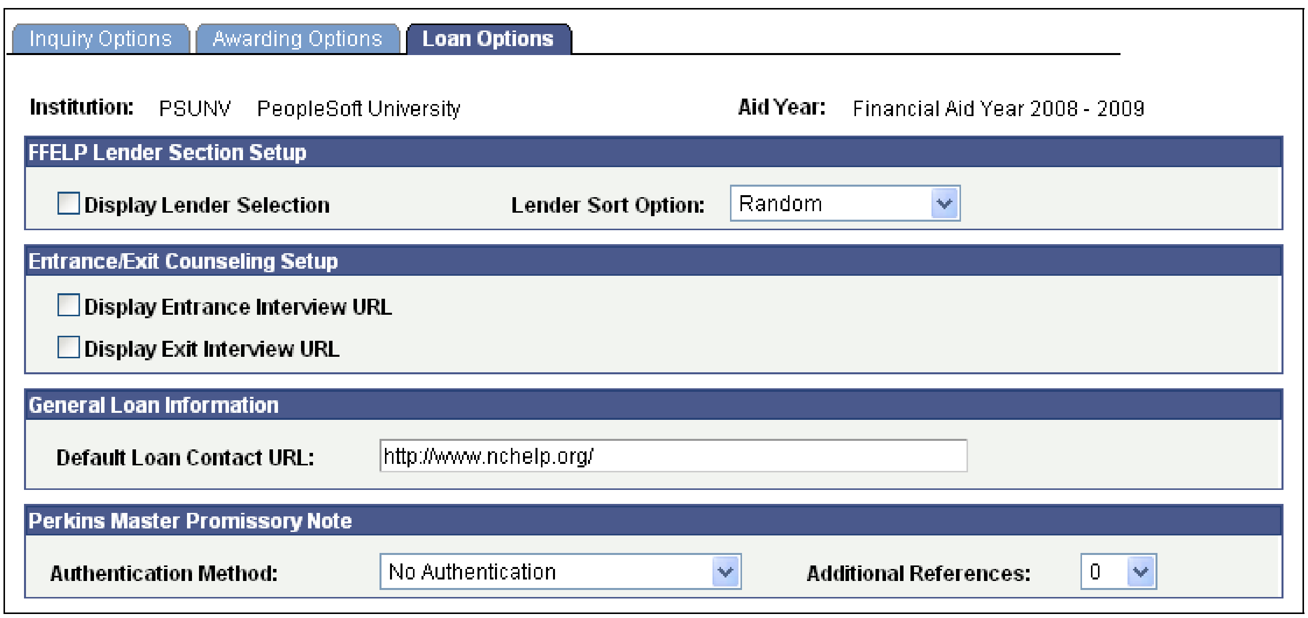
Pages Used to Set Up Lender Selection

Page Name	***Definition Name***	***Navigation***	***Usage***
Loan Options	SS_FA_INSTALL3	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options	Set lender selection to appear on the student self-service page.

Page Name	Definition Name	Navigation	Usage
Identify Self Service Lenders	SFA_LNDR_SELECT_SU	Setup SACR, Product Related, Financial Aid, Loans, Identify Self Service Lenders	Select the preferred lender for each loan type.
Create CRC Loan Participants	SFA_CRC_DEST_ID	Setup SACR, Product Related, Financial Aid, Loans, CR Common Line, Create CRC Loan Participants	Identify the lenders for Common Line loans.
Maintain Lender Codes	LENDER_LOAD_MAINT	Setup SACR, Product Related, Financial Aid, Loans, Common Line 4, Maintain Lender Codes	Identify the lenders for CL4 loans.

Displaying Lender Selection

Access the Loan Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options).



Loan Options page

FFELP Lender Section Setup

Display Lender Selection Select *x* to display the lender selection on the students' self-service pages.

Lender Sort Option

If you selected the Display Lender Selection check box, select *Random* or *Sequence Number* to control how the lender list is displayed in self-service:

Random (default) results in the lenders being displayed in a different random order each time the student accesses the Lender Selection page.

Sequence Number results in lenders being displayed based on the sequence number that was assigned to each lender on the Identify Self-Service Lenders page.

Entrance Exit Counseling Setup

Display Entrance Interview URL

To activate an entrance interview link for loan counseling, select this check box. The URL is defined on the Loan Counseling page.

Display Exit Interview URL

To activate an exit interview link for loan counseling, select this check box. The URL is defined on the Loan Counseling page.

General Loan Information

Enter a URL to enable students to access more detailed loan information. This URL can link students to an already existing intranet loan page or to an external loan servicer for which you have established a relationship. This link is available only if the loan has been originated in the system. The URL appears on the Financial Aid - Loan Application Information page.

Perkins Master Promissory Note

Use these options to support your eMPN processes and dynamically adjust the Self-Service page components within the eMPN process.

Authentication Method

Indicate the verification method for authenticating a student for eMPN. If you select *Birthdate,Personal Identification Number,* or *National ID Number,* students must enter the required information to authenticate and continue with the eMPN process. If you select *No Authentication,* the system does not prompt for authentication information.

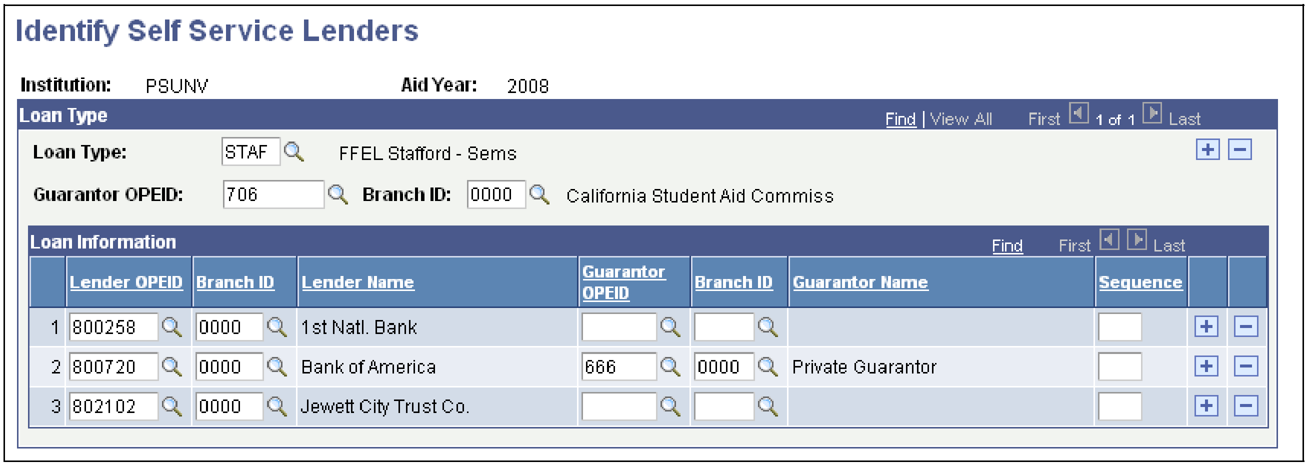
You define a student's birth date, national ID number, and PIN in Campus Community. The system always uses the student's primary national ID number for authentication purposes.

Additional References

Indicate the number of required references (0, 1, 2, or 3) in addition to the required two references collected to complete the eMPN.

Defining Self-Service Lenders

Access the Identify Self Service Lenders page (Setup SACR, Product Related, Financial Aid, Loans, Identify Self Service Lenders).



Identify Self Service Lenders page

Use this page to set up self-service lender lists and associated guarantors for each loan type. This information appears for the student in Self Service only if the Display Lender Selection option is selected on the Loan Options page and the student has been awarded a loan associated with any loan type set up on this page.

The Guarantor values defined on this page are used in combination with the lender selected by the student to derive the correct loan destination during the Loan Origination process.

You can set up a default guarantor in the Loan Type area, define specific guarantors for each lender in the Loan Information area, or both on this page. When the student selects a lender in Self Service, the system first attempts to use the guarantor value associated with the specific lender in the Loan Information area, and if no value exists, it looks for a guarantor value at the Loan Type level. If a guarantor value is not found, a guarantor is not attached to the student's lender selection record, which can result in no loan destination being found during the Loan Origination process.

To ensure that the Loan Origination program determines the correct CommonLine version and loan destination for each loan, you must set up CommonLine version 4 (CL4) loan destinations, Common Record CommonLine (CRC) loan destinations, or both that match the lender and guarantor combinations on this page.

Note. The Lender OPEID value is the only one seen by the student in Self Service. The Lender Branch ID, Guarantor OPEID, and Guarantor Branch ID values are transparent to the student when selecting a lender.

Loan Type

Loan Type

Select from the drop-down list box to identify each loan type for which you allow a student to select a lender through Self Service.

Guarantor OPEID (gurantor office of postsecondary education identifier)

Enter a guarantor OPEID as a default value for a specific loan type. The default guarantor value entered here will be attached to the student's lender selection record only if the Guarantor OPEID field within the Loan Information area is left blank for the lender selected.

The values in the lookup list are from the CRC participant setup.

Branch ID

Required if the Guarantor OPEID field is populated. Enter a branch ID that is associated with the guarantor.

Loan Information

Lender OPEID (lender office of postsecondary education identifier)	Enter the lender OPEID that will be available to the student for this loan type. The values in the lookup list are from the CRC participant setup.
Branch ID	Required if the Lender OPEID field is populated. Enter the branch ID that is associated with the lender.
Guarantor OPEID (gurantor office of postsecondary education identifier)	(Optional) Enter a guarantor at this level to indicate a specific guarantor for the lender. If the student selects the associated lender, the guarantor entered here will be attached to the student's lender selection record. The values in the lookup list are from the CRC participant setup. If you do not enter a guarantor here, the system will check for a default guarantor in the Loan Type area.
Branch ID	Required if the Guarantor OPEID field is populated. Enter a branch ID that is associated with the guarantor.
Sequence	If *Sequence Number* is selected in the Lender Sort Option field on the Loan Options page, use this field to display the lenders to the student. to the student. If no sequence numbers are identified, the system will order the list by lender OPEID.

Setting Up Loan Counseling

Loan counseling can be handled by the administrator or in Self Service by the student. When the student completes loan counseling for an award defined as requiring an entrance interview on the Indicators page, the loan can be disbursed.

This section discusses how to:

- Select the self-service mode for loan counseling.
- Control the display of loan counseling links.
- Define loan counseling types.
- Specify loan counseling links and attributes.
- Load Direct Loan batch files for loan counseling.

See Also: PeopleSoft Enterprise Financial Aid 9.0 PeopleBook, Setting Up Disbursement Rules

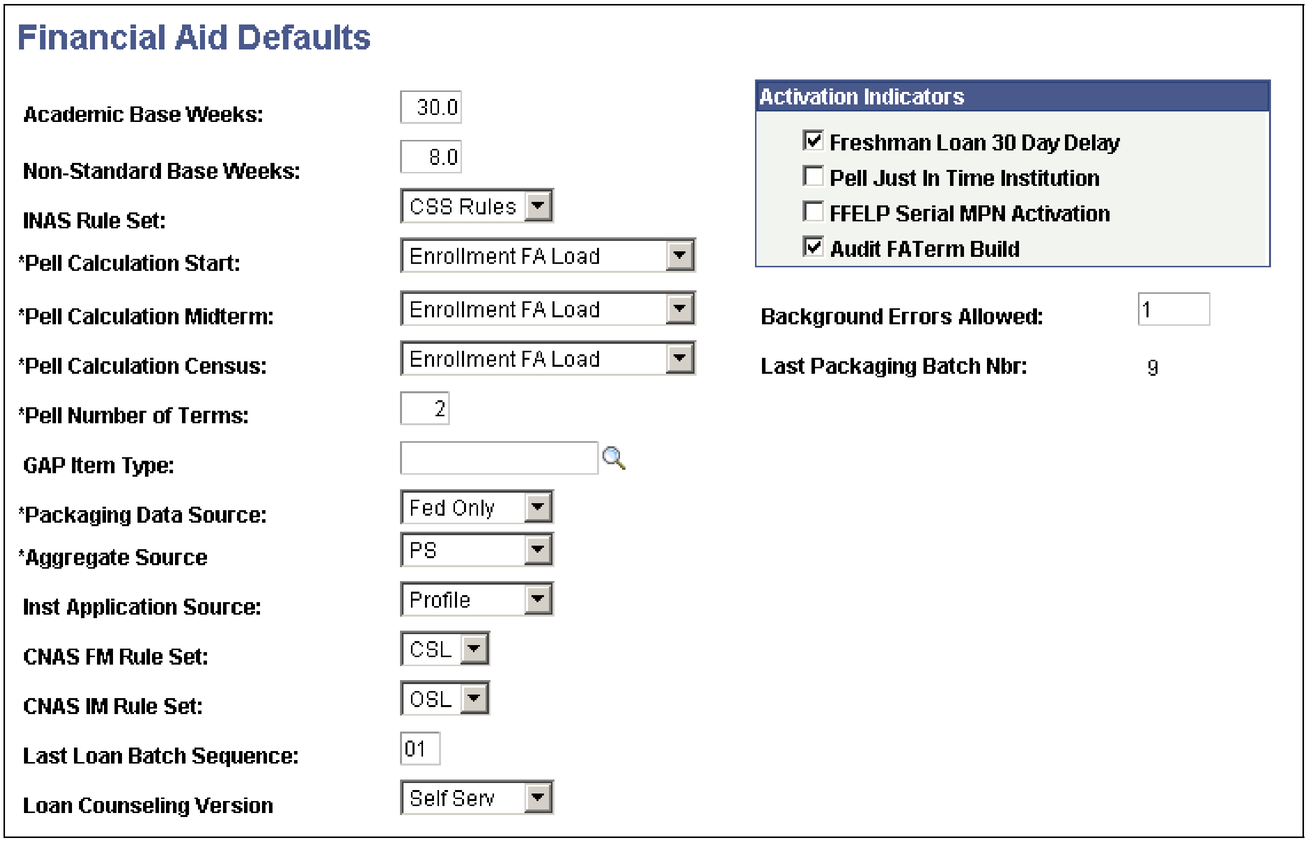
Pages Used to Set Up Loan Counseling

Page Name	***Definition Name***	***Navigation***	***Usage***
Financial Aid Defaults	INSTALLATION_FA	Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults	Select the Self Service mode for loan counseling.
Loan Options	SS_FA_INSTALL3	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options	Control the display of entrance interview links and exit interview links on the students' self-service pages.
Define Loan Type	SFA_LN_CNSL_XREF	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Counseling Options, Define Loan Type	Define loan-counseling requirements by loan type. Only loan codes that are defined to the federal Stafford loan type are updated withe entrance or exit data from the respective DL message class files, DECFXXOP or DLFFXXOP.
Loan Counseling	SFA_LN_CNSL_SETUP	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Counseling Options, Loan Counseling	Define the entrance and exit interview URLs and associated attributes.
Awarding Options	SS_FA_INSTALL2	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options	Remove the Entrance Interview URL that is used when loan counseling is in Administrative mode. The URL defined on the Awarding Options page is the Entrance Interview Information link on the students' Award Package page when loan counseling is handled by the administrator rather than the student.
Loan Counseling Search/Match Parameters	SFA_LN_SRCHMCH	Setup SACR, Product Related, Financial Aid, Loans, Set DL Loan Counseling Search Match	Define search and match criteria for use when loading DECFXXOP or DLFFXXOP data files during the FA Inbound process. XX represents the processing aid year.

Page Name	***Definition Name***	***Navigation***	***Usage***
Entrance/Exit Loan Counseling	SFA_LN_CNSL_TBL	• Financial Aid, Loans, View Loan Counseling Data, Entrance/Exit Loan Counseling • Click the Loan Counseling Status link on the Packaging Status Summary page (Financial Aid, View Packaging Status Summary)	Add and manage loan-counseling requirements.
Entrance Loan Counseling Summary	SFA_ENTRANCE_SUMM	Financial Aid, Loans, View DL Loan Counseling Data The search record key is DECFXXOP, where XX is the processing aid year.	View load data from the batch load file.
Exit Loan Counseling Summary	SFA_EXIT_SUMM	Financial Aid, Loans, View DL Loan Counseling Data. The search record key is DLFFXXOP, where XX is the processing aid year.	View load data from the batch load file.
Header and Trailer Data	SFA_ON_HDR_TRL_SEC	Click the Header and Trailer Data link on the Entrance Loan Counseling Summary page or the Exit Loan Counseling Summary page.	View detailed header and trailer information from the batch load file.
Entrance Counseling Exceptions	SFA_ENT_EXCEP_SEC or SFA_EXT_EXCEP_SEC	Click the View Exceptions link on the Entrance Loan Counseling Summary page or the Exit Loan Counseling Summary page.	View details for transactions that are not loaded.

Selecting Self-Service Mode for Loan Counseling

Access the Financial Aid Defaults page (Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults).

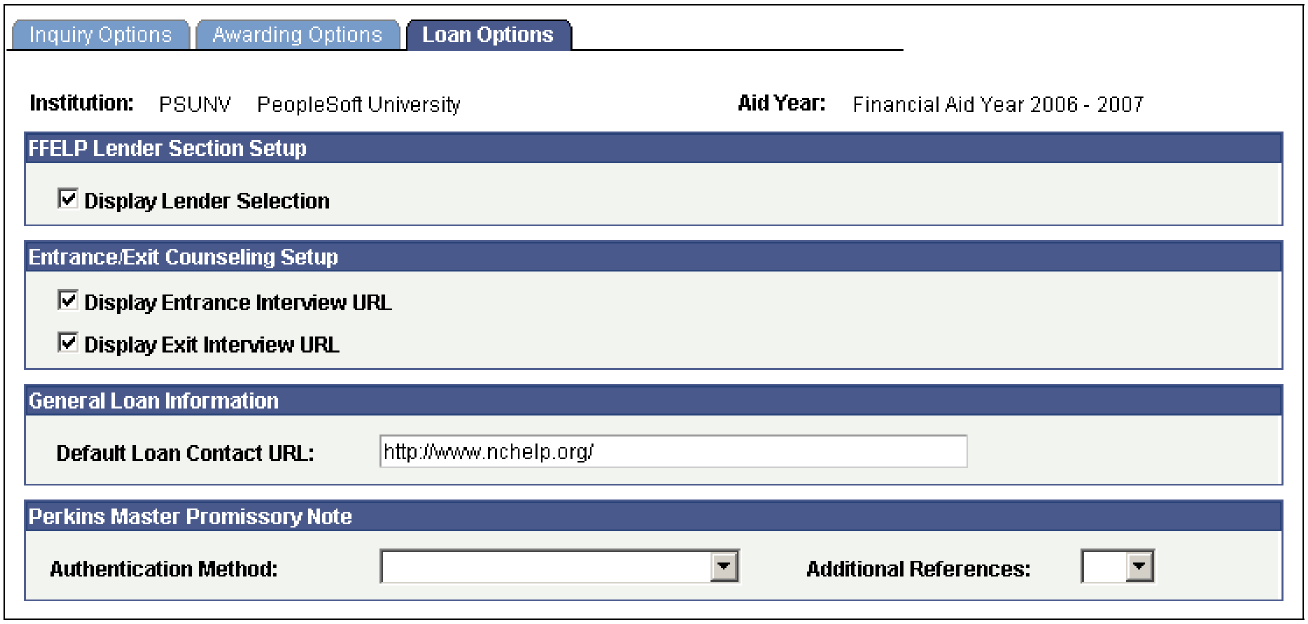


Financial Aid Defaults page

Loan Counseling Version Select *Self Serv*. The default is *Admin*.

Controlling the Display of Loan Counseling Links

Access the Loan Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options).



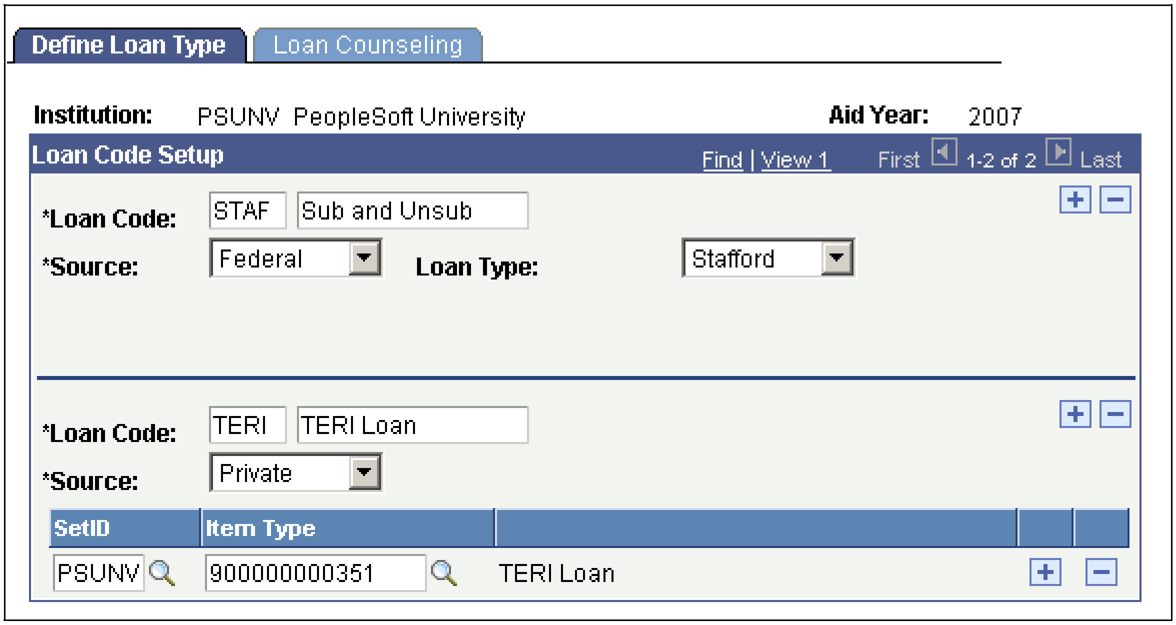
Loan Options page

To activate the display of loan counseling links, select the Display Entrance Interview URL and Display Exit Interview URL check boxes. If you do not want to display a link at certain times of the year, clear the check box.

Defining Loan Counseling Types

Use the Define Loan Type page to define types of loan counseling based on similar repayment options, interest rates, payment schedules, or other borrowing requirements.

Access the Define Loan Type page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Counseling Options, Define Loan Type).



Define Loan Type page

Loan Code

Enter a user-defined name and description for a group of loans that require the same loan counseling.

Source

Select the funding source. If you select *Federal*, also select the loan type, such as Stafford, Perkins, or PLUS. If you select *Institutnl*,*Private*, or *State*, also select the set ID and item type.

Specifying Loan Counseling Links and Attributes

Access the Loan Counseling page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Counseling Options, Loan Counseling).

Loan Counseling page

Entrance Interview Requirement

Multi-Year Select if a loan-counseling entrance interview is required only once in the student's career.

Annual Select if a loan-counseling entrance interview is required each year that the student secures this type of loan.

Exit Interview Requirement

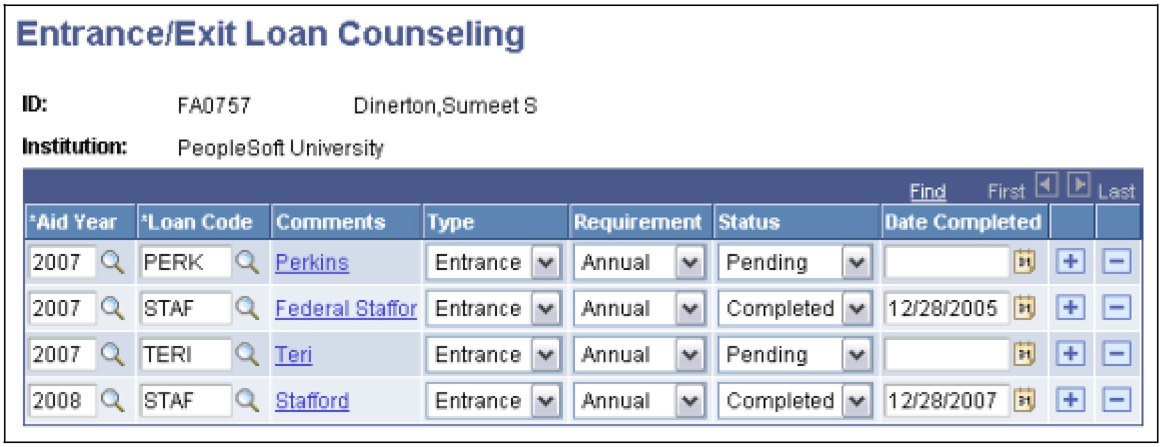
Multi-Year	Select if a loan-counseling exit interview is required only once in the student's career.
Annual	Select if a loan-counseling exit interview is required each year that the student secures this type of loan.
Use Default Exit Date	This check box determines how you specify the default exit date for activating your exit interview URL. If this check box is selected, the exit date calculation choice is displayed. If it is not selected, the exit date is displayed.
Exit Date Calculation Choice	Select the number of days from the exit or program completion date to start displaying the exit interview link to students. If you select *Multi-Year*, the system uses the student's graduation date to calculate the number of days based on the Exit Date Calculation Choice value. For example, if the value is *15* and the graduation date is June 30, the link will appear on June 15. If you select *Annual*,, the system uses the last day of the term and subtracts the value in the Exit Date Calculation Choice check box.
Exit Date	Enter or select the calendar date on which to start displaying the exit interview link.

Loading Direct Loan Batch Files for Loan Counseling

Schools that participate in the Direct Loan program and use Self Service Loan Counseling can load by batch both the Entrance and Exit Loan Counseling fixed-length data files to update corresponding completion dates. Supported message classes include:

- DECF07OP, 2006-2007: Entrance Counseling Fixed Length.
- DLFF07OP, 2006-2007: Exit Counseling Fixed Length.
- DECF08OP, 2007-2008: Entrance Counseling Fixed Length.
- DLFF08OP, 2007-2008: Exit Counseling Fixed Length.

Access the Entrance/Exit Loan Counseling page (Financial Aid, Loans, View Loan Counseling Data, Entrance/Exit Loan Counseling).



Entrance/Exit Loan Counseling

ID: FA0757 Dinerton,Sumeet S

Institution: PeopleSoft University

Find First Last

*Aid Year	*Loan Code	Comments	Type	Requirement	Status	Date Completed		
2007	PERK	Perkins	Entrance	Annual	Pending		+	−
2007	STAF	Federal Staffor	Entrance	Annual	Completed	12/28/2005	+	−
2007	TERI	Teri	Entrance	Annual	Pending		+	−
2008	STAF	Stafford	Entrance	Annual	Completed	12/28/2007	+	−

Entrance/Exit Loan Counseling page

Use this page to enter entrance or exit loan-counseling requirements. If an entrance loan counseling requirement is added, then a status of Completed is necessary to disburse the loan. The Disbursement or Authorization process will assess whether the loan-counseling requirement is annual or multiyear.

Only loan codes defined to the federal Stafford loan type are updated with entrance or exit data from the respective Direct Loan message class files, DECFXXOP or DLFFXXOP.

Comments Enter any internal counselor notes.

Type Select the type of loan counseling, *Entrance* or *Exit.*

Requirement Select the interval for loan counseling, *Annual* or *Multi-Year*.

Status Select the status of the loan-counseling requirement. The default status is *Pending.* If the loan-counseling requirement is Entrance, then a status of *Completed* is required before the loan is disbursed.

Date Completed For completed requirements, select the date that the requirement was completed. If a student match occurs during the batch load of a Direct Loan counseling file, this field is automatically updated.

Setting Up Self-Service Actions and Access in Packaging

To set up self-service actions and access in packaging, use the Financial Aid Item Types component (FINANCIAL_AID_ITEM). Use the component interface (FINANCIAL_AID_ITEM_CI) to load the data into the tables for these component interfaces.

This section discusses how to:

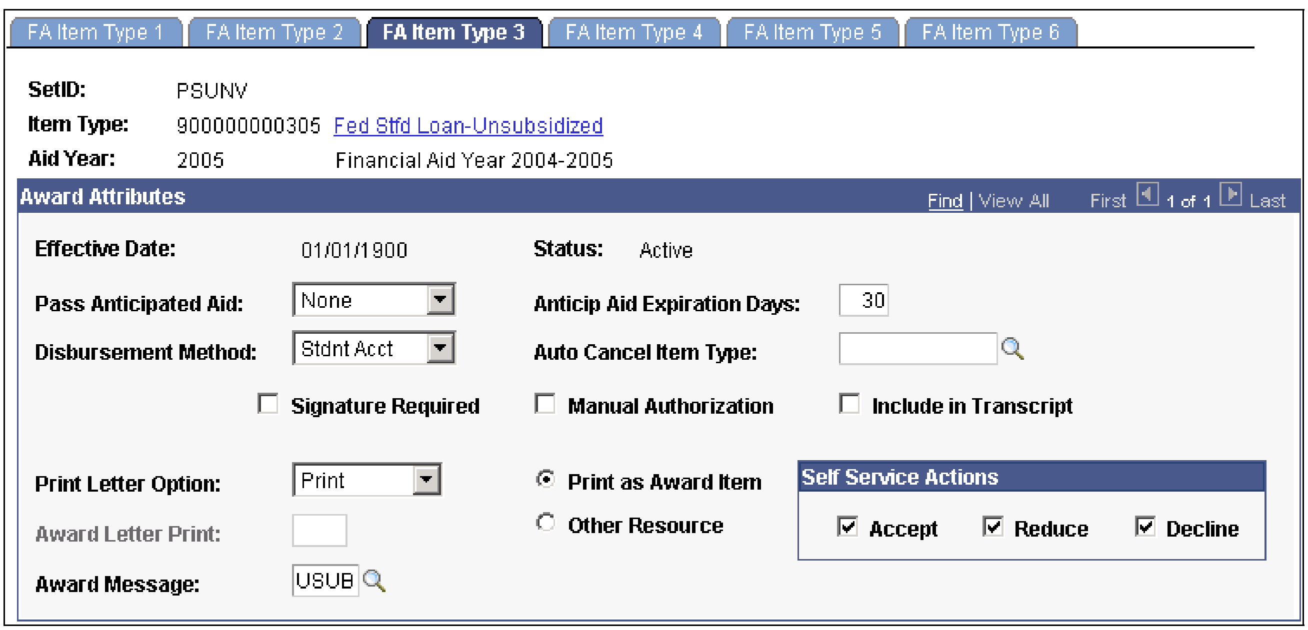
- Define self-service actions in packaging.
- Define self-service access in packaging.
- Change award and inquiry access.

Pages Used to Set Up Self-Service Actions and Access in Packaging

Page Name	*Definition Name*	*Navigation*	*Usage*
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Set up disbursement information and self-service action options.
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary, Packaging Status Summary	Review the student's need, budget, and award or change the student's packaging status. Set the student's self-service inquiry and award access.
Self-service Security	SFA_RUNCTL_SS_SEC	Financial Aid, Awards, Self Service Awarding, Assign Self Service Access, Self Service Security	Set the award and inquiry access value.

Defining Self-Service Actions in Packaging

Access the FA Item Type 3 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3).



FA Item Type 3 page

The system provides flexibility for controlling whether a student can accept and reduce or decline an award.

The Accept,Decline, and Reduce, options are available only if the Print Letter Option field is set to *Print.*

Self Service Actions

Accept Select to enable the student to accept a particular award. When you select Accept, the Reduce and Decline options become available.

Reduce You must select the Accept option and then the Reduce option to enable the student to reduce a particular award. Clear this option to prevent students from reducing their awards.

You cannot select the Reduce option if the Federal ID value is *ACG* or *SMART* on the FA Item Type 1 page

Decline Select to enable the student to decline a particular award. When a student declines an award, the system sets the Offered and Accept amount fields to 0.00, and the student cannot update the amounts.

Note. If you set the Print Letter Option field to *Never* or blank, the system displays the award on the Financial Aid - Award Summary page (View My Financial Aid), but not on the Award Package page (Accept/Decline Financial Aid).

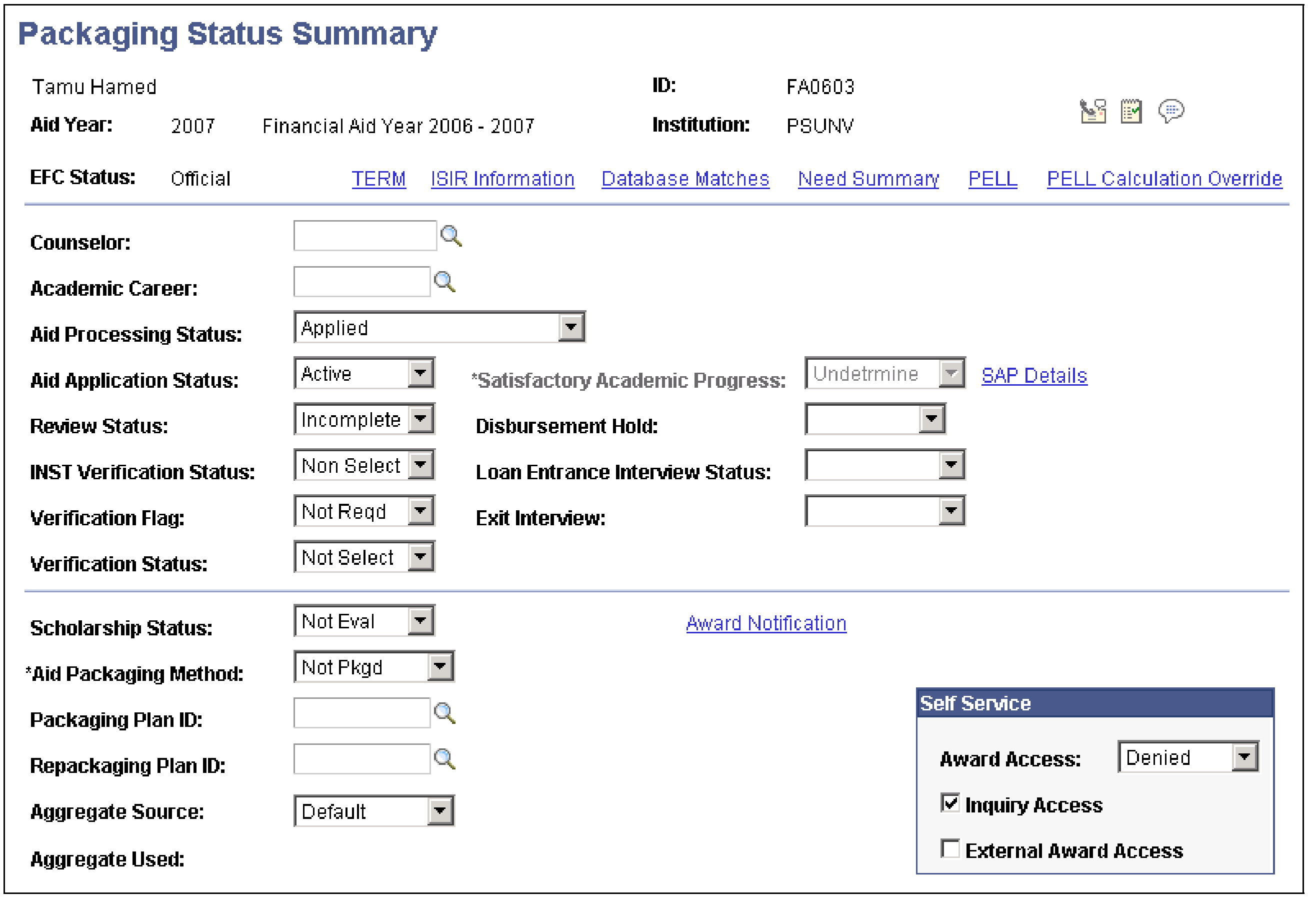
See Also

PeopleSoft Enterprise Financial Aid 9.0 PeopleBook, "Setting Up Disbursement Rules," Defining Item Type Disbursement Rules

PeopleSoft Enterprise Financial Aid 9.0 PeopleBook, "Setting Up Packaging Basics," Defining Disbursement and Anticipated Aid

Defining Self-Service Access in Packaging

Access the Packaging Status Summary page (Financial Aid, View Packaging Status Summary, Packaging Status Summary).



Packaging Status Summary page

Self-Service

You can set these values in a background process by running the Assign Self Service Access process.

Award Access

Select *Allowed* to allow the student access to award acknowledgement for the given year regardless of filtering option criteria established in self-service awarding options setup.

Select *Denied* to deny the student access to award acknowledgment for the given year regardless of filtering option criteria established in self-service awarding options setup.

Select *Use Filter* to require the student to meet the self-service awarding options access criteria to gain access to an award acknowledgment in self-service awarding.

Inquiry Access

Select to allow a student to view assigned financial aid awards.

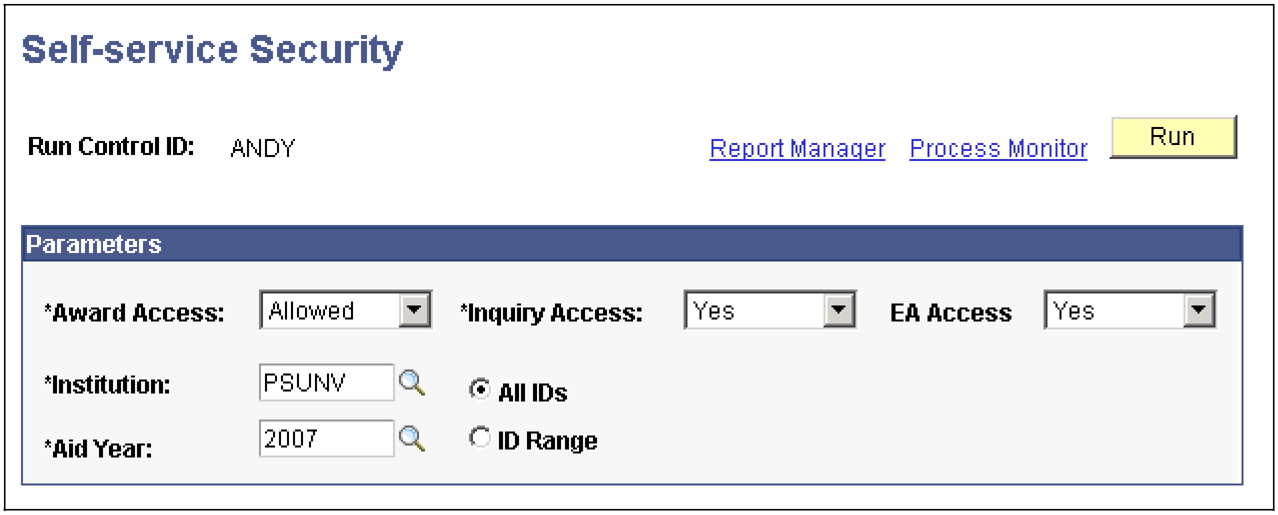
External Award Access

Select to allow a student access to view reported external awards.

Note. You must also select the Allow Access check box on the Inquiry Options page in setup to enable self-service access.

Changing Award and Inquiry Access

Access the Self-service Security page (Financial Aid, Awards, Self Service Awarding, Assign Self Service Access, Self-service Security).



Self-service Security page

Use this page to change the value in the Award Access and Inquiry Access fields on the Packaging Status Summary page. This controls whether a student can access either area of self-service.

Award Access	Select *Allowed*, *Denied*, or *Use Filter*.
Inquiry Access	Select *Yes* or *No*.
EA Access	Select *Yes* or *No*.
Institution	Select your institution.
Aid Year	Select the aid year for which to run this process.
All IDs	Select to update or change all IDs.
ID Range	Select to update or change a range of IDs.

Modifying Self-Service Loan Status Descriptions

To set up self-service loan status descriptions, use the Self Service Loan Status component (SS_FA_LOAN_STAT).

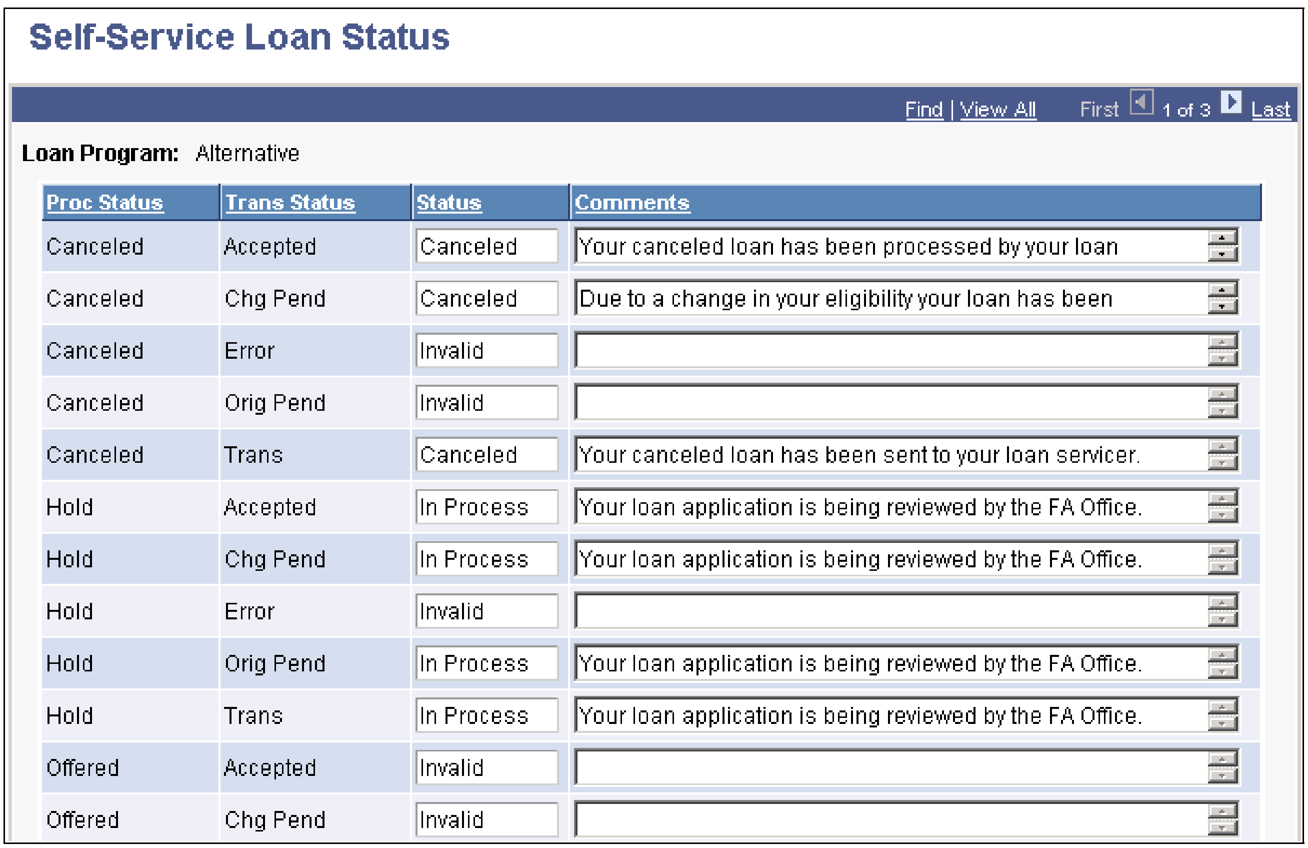
This section discusses how to modify loan status descriptions.

Page Used to Modify Self-Service Loan Status Descriptions

Page Name	***Definition Name***	***Navigation***	***Usage***
Self-Service Loan Status	SS_FA_LOAN_STAT	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self-Service Loan Status	Modify loan status descriptions and comments text that you want a student to see online. This page provides students with their loan application status. These values are delivered by Oracle.

Modifying Loan Status Descriptions

Access the Self-Service Loan Status page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self-Service Loan Status).


Self-Service Loan Status

Find | View All First 1 of 3 Last

Loan Program: Alternative

Proc Status	Trans Status	Status	Comments
Canceled	Accepted	Canceled	Your canceled loan has been processed by your loan
Canceled	Chg Pend	Canceled	Due to a change in your eligibility your loan has been
Canceled	Error	Invalid	
Canceled	Orig Pend	Invalid	
Canceled	Trans	Canceled	Your canceled loan has been sent to your loan servicer.
Hold	Accepted	In Process	Your loan application is being reviewed by the FA Office.
Hold	Chg Pend	In Process	Your loan application is being reviewed by the FA Office.
Hold	Error	Invalid	
Hold	Orig Pend	In Process	Your loan application is being reviewed by the FA Office.
Hold	Trans	In Process	Your loan application is being reviewed by the FA Office.
Offered	Accepted	Invalid	
Offered	Chg Pend	Invalid	

Self-Service Loan Status page

You can view or modify the status and comments text that you want a student to view online.

Proc Status (processing status)	Indicates where the loan application is in the origination process between your institution and the loan servicer.
Trans Status (transaction status)	Indicates the current status of the loan application.

Creating User-Defined Text

Each self-service page has an area for additional explanatory text. The text resides in the message catalog. The system displays the message number to help you determine the text to include on a page. If you do not want a message on a particular page, you can delete the text in the message catalog or delete the message entirely. However, Oracle suggests that you delete only the text, not the reference number, so that you can add text as needed in the future.

You might add user-defined text to:

- Explain why disbursed awards cannot be updated.
- Explain why custom split awards cannot be updated.
- Explain why subsidized and unsubsidized loans have automatic treatment.
- Explain why loans in transit cannot be updated.
- Provide general rules of navigation.
- Provide specific information, such as instructing students not to increase awards.

Message numbers 500 and greater for Message Set 14409 are designated as user-definable. Oracle delivers some message numbers with defined message text and explanation as examples.

Chapter 8

Setting Up Recruiting and Admissions Self-Service

This chapter provides an overview and discusses how to set up self-service request information.

Understanding Self-Service Request Information

This section lists prerequisites and discusses self-service request information.

Prerequisites

Before you can set up your parameters for the Request Information transaction, you must set up a communications infrastructure in PeopleSoft Enterprise Campus Community. The required steps for setting up communications for the Request Information transaction include defining communication keys and event IDs. All communications for the Request Information transaction must be defined using the administrative function *PSSV.* You define communication keys on the Communication Speed Key Table page.

Note. To access the Communication Speed Key Table page, you must enter an administrative function. Enter *PSSV* (prospect self-service).

After you define communication speed keys, you must define event IDs. You define event IDs on the Event Definition page. Event IDs contain the communication keys that you set up previously. You select event IDs on the Web Prospect Setup 2 page. Event IDs contain the specific communications that the prospect can choose from or automatically receive depending on your setup.

Note. To access the Event Definition page, you must enter an administrative function. Enter *PSSV.*

The Web Prospect Setup 2 page also enables you to control whether visitors can choose from a selection of communications, depending upon the career of interest, or whether they are sent a default communication. If you decide to let prospects select from a list of communications, you can define the available choices.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Communications," Defining Communication Speed Keys

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Using the 3C Engine," Defining 3C Engine Events

Chapter 24, "Using Self-Service Student Admissions," Requesting Information, page 303

Setting Up Self-Service Request Information

To set up self-service request information, use the Web Prospect Create component (ADM_WEB_PRS_SETUP).

Use the Web Prospect Create Table component to determine which information segments you want to enable in the Request Information self-service transaction and to set up academic institution and career parameters (such as which careers you want available to the visitor, and which recruiting center you want assigned to that career).

This section discusses how to:

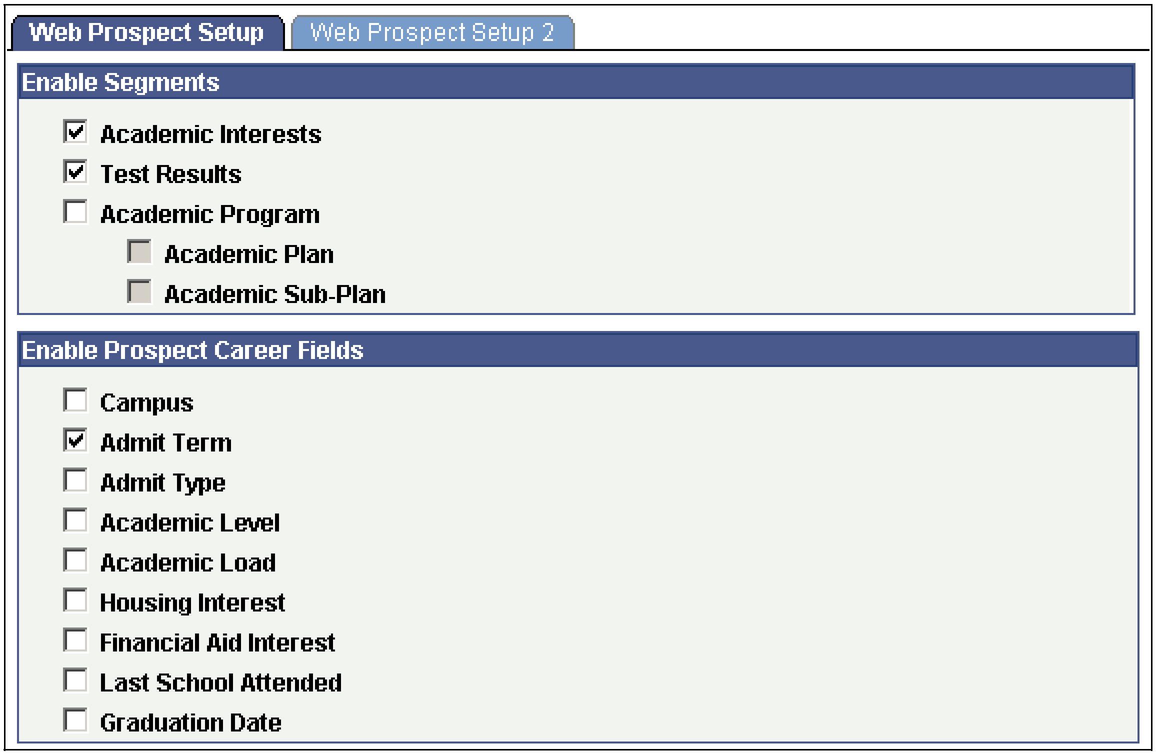
- Enable segments and prospect career fields.
- Set up institution and career parameters.

Pages Used to Set Up Self-Service Request Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Web Prospect Setup	ADM_WEB_PRS_TBL	Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table	Enable or disable Request Information self-service transaction segments and prospect career fields.
Web Prospect Setup 2	ADM_WEB_PRS2_TBL	Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table, Web Prospect Setup 2	Define institution and career setup parameters for the Request Information self-service transaction. The academic institutions and careers that you select on this page appear as choices on the Request Information detail page.

Enabling Segments and Prospect Career Fields

Access the Web Prospect Setup page (Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table).



Web Prospect Setup page

By selecting the check boxes on this page, you enable a segment or field to appear on the self-service Request Information transaction. This enables you to choose what kind of information you collect from prospects who request admissions information. The selections that you make here apply to every academic institution in your system. Therefore, in a multi-institution system, each institution should agree on how to complete this page.

Enable Segments

If you select the Academic Interests or the Test Results check boxes, the respective pages appear in the Request Information self-service transaction. Visitors requesting admissions information have the option of entering academic interest and test result information, which the system then stores in the Academic Interest (ADM_INTEREST_ADMP) and Test Scores (ACAD_TST_RSLT_ADMP) components.

If you select the Academic Program, Academic Plan, and Academic Sub-Plan check boxes, corresponding fields appear on the Request Information detail page. Visitors can use these fields to enter the program, plan, and subplan that interests them. The system stores this information on the Create/Update Prospects - Prospect Program Data page.

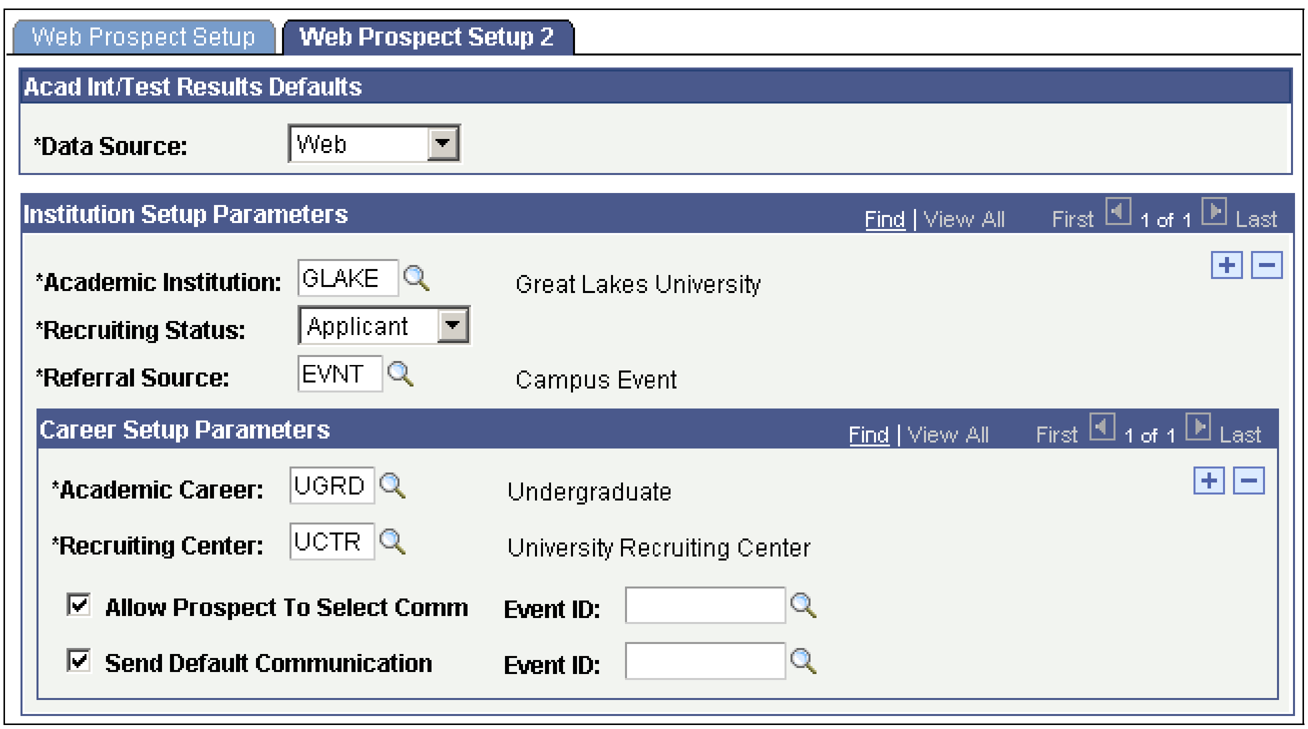
Enable Prospect Career Fields

Each check box in this group box corresponds to a field on the Request Information detail page. Select the check boxes of the information that you want to collect from visitors who are requesting admissions information. Each item in this group box corresponds to an item in the Create/Update Prospects component (ADM_PROSPECT_PROG). Thus, by selecting these check boxes, you can populate additional fields in the Create/Update Prospects component (assuming that the visitor enters the information).

Note. Clearing a check box in this group box hides its corresponding field on the Request Information detail page. For example, if you clear the Academic Level check box, visitors to your website do not see the Academic Level field on the Request Information detail page.

Setting Up Institution and Career Parameters

Access the Web Prospect Setup 2 page (Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table, Web Prospect Setup 2).



Web Prospect Setup 2 page

Acad Int/Test Results Defaults

Data Source

Web is the default. You can change this value. The data source posts to the Academic Interests and Test Results pages.

Institution Setup Parameters

Academic Institution Select the academic institution that you want available to the visitor. If you enter more than one academic institution, visitors can select the academic institution that they are interested in on the Request Information detail page. The system uses the academic institution that the visitor selects to create the prospect record. If you select only one academic institution, the system hides the Academic Institution field on the Request Information page. In this case, the system uses the one academic institution that you entered here to create the prospect record. You must enter at least one academic institution.

Recruiting Status Select the recruiting status that you want the system to assign to the new prospect record. You can select a different recruiting status for each academic institution. The system assigns the selected recruiting status to new prospect records, based on information collected through the Request Information self-service transaction.

Referral Source Select the referral source for information collected through the Request Information self-service transaction. You can select a different referral source for each academic institution. The referral source that you enter here posts to the Prospect Career Data page.

Career Setup Parameters

Academic Career Select the academic careers that you want available for the visitor to select. On the Request Information detail page, visitors can select the academic careers that interest them. The system uses the selected academic career to create the prospect record. You must enter at least one academic career.

Recruiting Center Select the recruiting center that you want the system to assign to the new prospect record. You can select a different recruiting center for each academic career. The system assigns the selected recruiting center to new prospect records, based on information collected through the Request Information self-service transaction.

Allow Prospect to Select Comm (allow prospect to select communication) Select to enable visitors to select from a list of available communications. If you select this check box, a group box that lists the communication items contained in the event ID that you select appears on the Request Information detail page. Visitors can select which items to receive. For example, the *UGRD Web Prospect* event ID at PSUNV includes communications containing information on financial aid, campus housing, and undergraduate applications. Visitors can choose one or more communications from this list. However, only those events that have the User Selection check box selected on the Event Definition Setup page appear as choices in the Event ID field, next to the Allow Prospect to Select Comm field.

Send Default Communication Select to send a default communication to all visitors who request admissions information for this particular academic institution and career.

Event ID

Select the event IDs that contain the communications that you want mailed to visitors (for each academic career). Enter an event ID in at least one of the Event ID fields. If both fields are blank, then a visitor could submit a Request Information request and receive a confirmation that the request went through, without receiving any communication. The event ID tells the system which communications to send to the visitor. Define event IDs on the Event page.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Managing Campus Event Planning," Creating an Event.

Chapter 9

Setting Up Academic Advisement Self-Service

This chapter discusses how to:

- Set up self-service features for Academic Advisement.
- Define self-service installation settings.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Reviewing Installation Setup and System Defaults," Selecting Student Administration Installation Options

Setting Up Self-Service Features for Academic Advisement

To set up self-service Academic Advisement features, use the Academic Advising setup (SAA_SS_RPT_OPT) component.

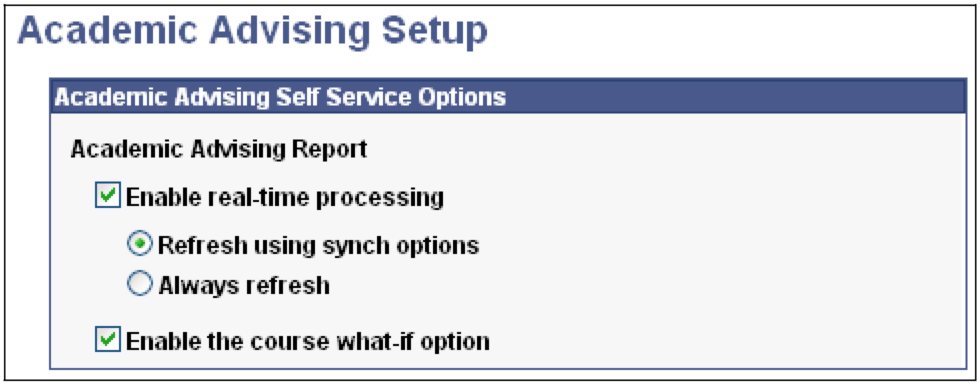
This section discusses how to define Academic Advisement setup.

Page Used to Set Up Self-Service Features for Academic Advisement

Page Name	*Definition Name*	*Navigation*	*Usage*
Academic Advising Setup	SAA_SS_RPT_OPT	Set up SACR, Common Definitions, Self Service, Academic Advising	Enable self-service features and define behavior for self-service Academic Advisement functionality.

Defining Academic Advisement Setup

Access the Academic Advising setup page (Set up SACR, Common Definitions, Self Service, Academic Advising).



Academic Advising Setup page

Enable real-time processing

Select to instruct the system to automatically generate an advisement report when students access the My Academic Requirements page.

Use the two radio buttons to indicate that your institution wants to use real-time processing with or without synchronization options (also referred to as triggers).

If you enable real-time processing and select *Always refresh,* then the system will regenerate a report when the student accesses My Academic Requirements, Search by My Requirements, or Plan by My Requirements. That is, the report is regenerated regardless of whether anything changed on the student's record.

Note. On the administrative side, the system will also regenerate the report if the user accesses a previously run report and, from the Report Request page, clicks the View Report link.

Enable the course what-if option

Select to enable students to run a course what-if scenario in self service using the Create What-if Scenario page. Clear the check box to disable this ability.

See Also

Chapter 22, "Using Academic Advisement Self Service," page 267

Defining Self-Service Installation Settings

To define conditions under which an advisement report is generated for self service, use the Academic Advisement installation component (SAA_INSTALL_AA).

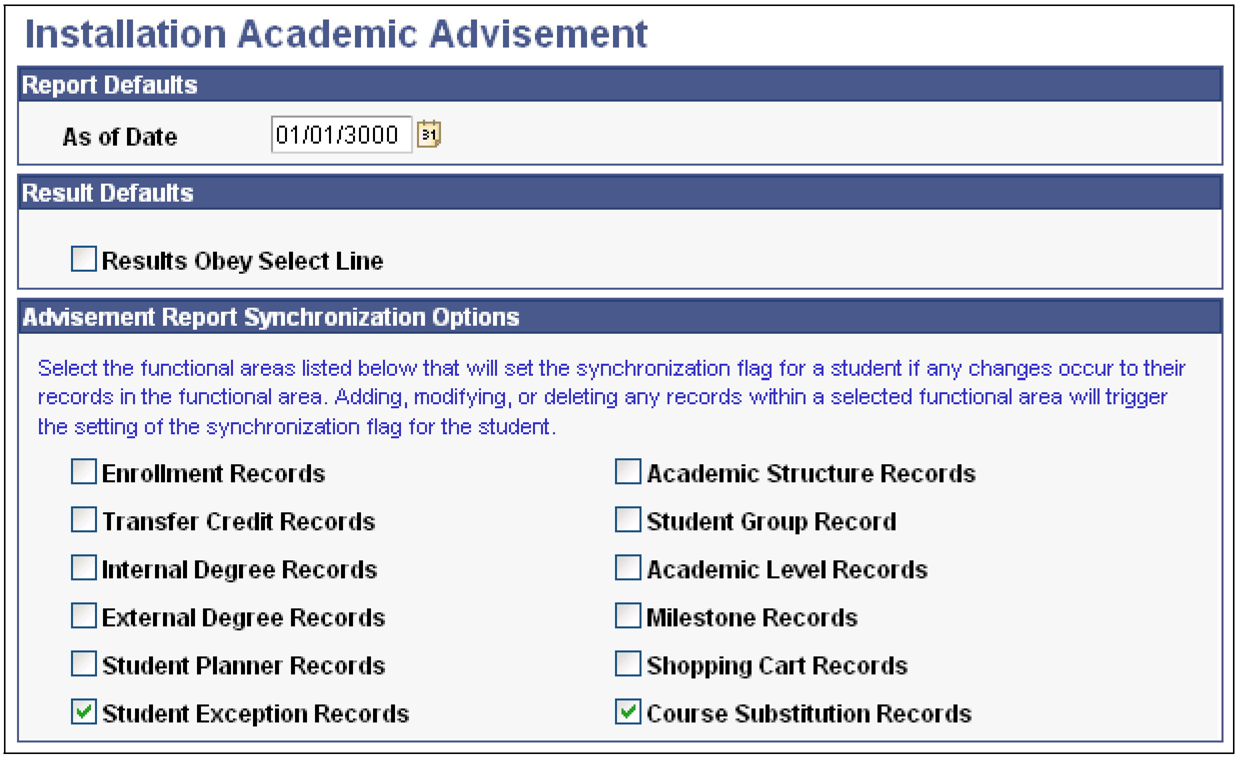
This section discusses how to define installation settings for Academic Advisement.

Page Used to Define Self-Service Installation Settings

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Academic Advisement	SAA_INSTALL_AA	Set Up SACR, Install, Academic Advising Installation, Installation Academic Advisement	Disable on-demand report processing and enable the system to track which students need to have new reports generated, based on changes made to their academic history.

Installing Self-Service Academic Advisement

Access the Installation Academic Advisement page (Set Up SACR, Install, Academic Advising Installation).



Installation Academic Advisement page

The check boxes on this page determine under which conditions a student's academic history will cause the system to generate an advisement report for a student. If the institution has enabled real-time processing (on the Academic Advising Setup page) and selected check boxes on this page, a new advisement report will be generated when a student accesses the My Academic Requirements page. If the institution has not enabled real-time processing, the institution can use the conditions to "trigger" a batch process to run and generate advisement reports at predefined intervals. To run the advisement reports in batch based on these synchronization options, your institution will use the Generate Report Requests (SAA_RC_RPTRQST) and Generate Advisement Reports (SAA_RC_RPTGEN) components.

Selecting a check box causes the system to set a synchronization (sync) flag for that change. In turn, the flag cues the institution to rerun the advisement report. Here are the actions for each check box that set a sync flag:

Enrollment Records	Adding, deleting, or modifying any enrollment records through Enrollment, Enrollment Requests, Quick Enrollment, or Grading.
Transfer Credit Records	Posting or unposting any transfer credit.
Internal Degree Records	Awarding, revoking, or modifying any degree record through the Student Program/Plan, Degree Maintenance, or Batch Graduation Processing pages.
External Degree Records	Adding, modifying, or removing any externally awarded degrees through the External Education pages.
Student Planner Records	Adding, modifying, or removing any records from the student's planner.
Academic Structure Records	Adding, modifying, or removing any values from the student's Records Program stack. This also includes admissions matriculation.
Student Group Record	Adding, modifying, or removing any advisement student group values for a student.
Academic Level Records	Making any changes to a student's academic level, either by automated processes from grading and enrollment or through manual override in term processing.
Milestone Records	Adding, modifying, or removing any milestone values for a student.
Shopping Cart Records	Adding, modifying, or removing any records in the student's Shopping Cart.
Student Exception Records	Reprocessing when a student override is made. Specifically, the flag is set when any of the following types of student-based exceptions are created: course directive, requirement change, waiver, or override. The flag is also set when there is any change made to such an exception, whether it is a change to the description or to the override detail itself.
Course Substitution Records	Reprocessing when a course substitution is made using the Create Course Substitution component (STDNT_CRS_SUBS). The flag is also set when there is any change made to the component, whether it is a change to the long description or to the substitution detail itself.

Example

An institution selects the *Enrollment Records* check box. A student has an advisement report dated May 10, 2006. The current date is July 18, 2006 and the student has just enrolled in a summer school class. The change to the student's enrollment record sets a synchronization flag. The institution nightly runs a batch process to generate new advisement reports for students for whom the synchronization flag is set to "Y." On the following day, the student looks at his My Academic Requirements page. The advisement report that appears there will be up to date (with a date and time stamp as of the previous night's batch process).

Alternatively, if the institution has selected the Enable real-time processing check box on the Academic Advising Setup page, then when student enrolls in a class then the system automatically generates the report to automatically (in real time) when the student next accesses the My Academic Requirements page. The student will immediately see the course he's just enrolled in.

Chapter 10

Using Student Center

This chapter provides an overview and discusses how to use the self-service Student Center.

Understanding Self-Service Student Center

The Student Center is a self-service page that provides students a single entry point from which to begin navigation to student related transactions. It also presents to students, in one location, the information that is important to them, such as their class schedule, enrollment dates, and account information.

From the Student Center, students access any student related transaction that is available from Campus Self Service. You can use the Student Center Options page and security setup to control which sections and transactions appear on the Student Center.

The sections that the Student Center can display are:

- Academics

  Provides links to enrollment and academic records self-service transactions. Also displays the student's schedule, which displays the classes, in any career, in which the student is registered for the current term, as of today's date. If there are no such classes, the system looks at the next term in which the student is term activated for classes to display. In addition, provides a link to the Enrollment Shopping Cart, where students can search for and temporarily save classes for a future term, until that term's enrollment period.

- Finances

  Provides links to PeopleSoft Student Financials self-service transactions and displays account summary information.

- Personal Information

  Provides links to PeopleSoft Campus Community self-service transactions and displays contact information.

- Admissions

  Provides links to PeopleSoft Recruiting and Admissions self-service transactions.

- Holds

  Provides a list of hold items. Students can click the Details link to access the Holds self-service application page for more information.

- To Do List

  Provides a list of to do items. Students can click the Details link to access the To Do List self-service application page for more information.

- Enrollment Dates

  Provides a list of enrollment dates. Students can click the Details link to access the Enrollment Dates self-service application page for more information.

- Advisor

  Provides advisor information. Students can click the Details link to access the View My Advisor self-service application page for more information.

- Related Links

  Displays the links that you define on the Student Center Options page.

Note. Students who use pop-up blocker software in their browsers will be unable to view .PDF transcripts and many other request results in Student Center.

See Also

Chapter 5, "Setting Up Student Records Self-Service," Setting Up a Self-Service Student Center, page 30

Using Self-Service Student Center

Students can use the self-service Student Center.

Page Used to Use Self-Service Student Center

Page Name	***Definition Name***	***Navigation***	***Usage***
Student Center	SSS_STUDENT_CENTER	Self Service, Student Center	Students use this page to access student related transactions and to view important information, such as class schedule, dates, and account information.

Chapter 11

Using Faculty Center

This chapter provides an overview of the self-service Faculty Center and discusses how to:

- Use the self-service Faculty Center.
- Enter grades through self-service.
- View self-service class rosters.
- Use Learning Management System (LMS) authentication.

Understanding the Self-Service Faculty Center

The Faculty Center is a self-service component that provides instructors with the ability to:

- View their teaching schedule.
- View their exam schedule.
- View their textbook summary.
- View their grade rosters, enter grades, and post grades.
- View their class rosters.
- Access your Learning Management System.
- Access the Gradebook and class assignments, if your institution has licensed PeopleSoft Enterprise Gradebook.
- Link to personal data summary.

Depending on security, instructors can also:

- Search for classes and browse the course catalog.
- Locate a faculty member.
- Access your Learning Management System.
- Access the Advisor Center.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Using the Student Services Center Component"

Chapter 12, "Using Self-Service Course Catalog and Schedule," page 123

Chapter 22, "Using Academic Advisement Self Service," page 267

PeopleSoft Enterprise Gradebook 9.0 PeopleBook, "Using the Self-Service Gradebook"

Using the Self-Service Faculty Center

Instructors can use the self-service Faculty Center. Access is available through standard menu navigation as well as through icons and subtabs within the Faculty Center.

Pages Used for the Self-Service Faculty Center

Page Name	***Definition Name***	***Navigation***	***Usage***
My Schedule	INSTR_CLASS3	Self Service, Faculty Center, My Schedule	Instructors use this page to access instructor-related transactions and to view their teaching and exam schedules. Instructors see only those terms for which they are assigned as the instructor.
Class Detail	SSR_CLSRCH_DTL	Click a class link within My Teaching Schedule on the My Schedule page.	Instructors can view the details of the classes in their schedules.
Textbook Summary	SSR_SSCLSTXB_SUM	Click the View Textbook Summary link of the Faculty Center, My Schedule page.	Instructors can view textbook assignments for each of their classes. The link is available if you select the Display Textbook Summary link – Instructor Self Service check box on the Other page in the Student Records setup component (SSR_SS_ENRL_OPT).

Page Name	Definition Name	Navigation	Usage
View My Weekly Schedule	SSR_SSINSTR_WEEK	Click the View Weekly Teaching Schedule link on the My Schedule page. Click the View Weekly Exam Schedule link on the My Schedule page.	Instructors can view their weekly teaching and exam schedules in a grid format.
Personal Data Summary	SSS_PRSNLDATA_SUMM	Click the View Personal Data Summary link on the My Schedule page.	Instructors can view a summary of links to their personal data.
Class Roster	SS_FAC_CLASS_ROST	• Self Service, Faculty Center, Class Roster • Self Service, Faculty Center, My Schedule Click the Class Roster icon on the My Schedule page or click the Class Roster subtab.	Instructors view the students who are enrolled in a class, have dropped a class, or are on the waitlist for a class. Instructors can send email notifications to selected students or all students in the class. Instructors have the option to display student photos on the class roster.
Grade Roster	SS_GRADE_ROSTER	• Self Service, Faculty Center, Grade Roster • Self Service, Faculty Center, My Schedule Click the Grade Roster icon on the My Schedule page or click the Grade Roster subtab.	Instructors view or enter grades, update the roster's approval status, and post grades.
Gradebook	LAM_CLASS_GRADES	• Self Service, Faculty Center, Gradebook • Self Service, Faculty Center, My Schedule Click the Gradebook icon on the My Schedule page or click the Gradebook subtab.	Enter or review grades and comments, export grades to Microsoft Excel, or update grades to the grade roster for posting.

Page Name	***Definition Name***	***Navigation***	***Usage***
Class Assignments	LAM_CLASS_ACTIVITY	• Self Service, Faculty Center, Assignments • Self Service, Faculty Center, My Schedule Click the Assignments icon on the My Schedule page or click the Assignments subtab.	Create, review or edit Gradebook class assignments.
My Advisees	SSS_ADVISEE_LIST	Self Service, Advisor Center, My Advisees	Advisors can view their advisees, display advisee photos, and link advisee student details. Details include a variety of data such as a view of the advisee's student center, shopping cart, planner, academic requirements, general information, and academic history. See Chapter 22, "Using Academic Advisement Self Service," page 267.
Advisee Student Center	SSS_STUDENT_CENTER	• Self Service, Advisor Center, Advisee Student Center • Self Service, Advisor Center, My Advisees Click View Student Details on the My Advisees page for an advisee or click the Student Center subtab.	Advisors can access an advisee's related transactions and view information such as class schedule, dates, and account information.
Advisee General Info	SCC_SUM_PERSONAL	• Self Service, Advisor Center, Advisee General Info • Self Service, Advisor Center, My Advisees Click View Student Details for an advisee on the My Advisees page. Click the General Info subtab.	Advisors can view information such as an advisee's service indicators, initiated checklists, personal data, and student groups.

Page Name	Definition Name	Navigation	Usage
Advisee Transfer Credit	SCC_SUM_TRNSFRCRDT	• Self Service, Advisor Center, Advisee Transfer Credit • Self Service, Advisor Center, My Advisees Click View Student Details on the My Advisees page for an advisee. Click the Transfer Credit subtab.	Advisors can view information such an advisees's course and test credits.
Advisee Academics	SCC_SUM_ACADEMICS	• Self Service, Advisor Center, Advisee Transfer Credit • Self Service, Advisor Center, My Advisees Click View Student Details on the My Advisees page for an advisee, Click the Academics subtab.	Advisors can view information such as an advisee's career, program, and term summary.
Search for Classes	SSR_CLSRCH_ENTRY	Self Service, Search, Class Search	Instructors can search for classes.
Browse Course Catalog	SSS_BROWSE_CATLG	Self Service, Search, Browse Course Catalog	Instructors can browse the course catalog to see a list of courses offered at the institution.
Faculty Search	SSR_FIND_INSTR	Search, Faculty Search	Instructors can locate the teaching schedule for another instructor. If available, once the instructor's teaching schedule is displayed, click on the instructor's name to send an email.
Learning Management System	LMS_TARGET_SELECT	Self Service, Learning Management Systems	Instructors can access your institution's Learning Management Systems.

Entering Grades Through Self-Service

This section lists prerequisites and discusses how instructors enter grades through self service.

Prerequisites

For instructors to access their midterm and final grade rosters, you must:

- Generate the rosters.
- Assign the instructors to classes.
- Give the assigned instructors appropriate grade roster access of Grade, Approve, or Post.

Pages Used to Enter Grades Through Self Service

Page Name	***Definition Name***	***Navigation***	***Usage***
Grade Roster	SS_GRADE_ROSTER	Self Service, Faculty Center, Grade Roster Self Service, Faculty Center, My Schedule Click the Grade Roster icon on the My Schedule page or the Grade Roster subtab.	Instructors view or enter grades, update the roster's approval status, and post grades.
Grade Change Request	SS_GRADE_CHANGE	Click the Grade Change Request link on the self-service Grade Roster page.	Instructors submit grade change requests. This link appears after grades are posted.
Send Notification	SSS_NOTIFY	Click the Notify Selected Students or Notify All Students link on the Self-Service Grade Roster page.	Instructors send email notifications to selected students or all students in a class. If a notification failure occurs, the sender receives a returned email indicating the type of failure, for example, host unknown.
Students Without Email Address	SSR_NO_EMAIL	This page appears when you click the Notify All Students link and students are on the grade roster who do not have email addresses in the system.	Instructors view the students on the grade roster who do not have email addresses.

Page Name	***Definition Name***	***Navigation***	***Usage***
Transcript Note	GRADE_ROSTER_NOTE	Click the Note link on the Transcript Notes tab of the self-service Grade Roster page.	Instructors can add a transcript note to a student's transcript.
Printer Friendly Version	SS_GRADE_RSTR_PRT	Click the Printer Friendly Version link from the Self Service Grade Roster page.	Displays a printer friendly version of the grade roster.

Entering Grades Through Self Service

Access the Grade Roster page (Self Service, Faculty Center Click the Grade Roster icon on the Faculty Center page.)

The Grade Roster icon appears on the Faculty Center - My Teaching Schedule page after grade rosters are generated for a class and after the instructor has been assigned grade, approve, or post access within the schedule of classes. Instructors with grade, approve, or post access for the class can assign grades to students. Instructors with approve or post access can use the Approval Status field to update the status of the final grade roster before saving it. Values are *Approved, Not Reviewed,* and *Ready for Review.* A status of *Approved* is required to post the roster. When the status is set to *Approved*, the post button becomes available for instructors with post access. The instructor can then post grades from the self-service grade roster. When a class is posted, the Request Grade Change button becomes available for instructors to change a student's grade.

The select check box accommodates both the Notify feature as well as in conjunction with add this grade to selected students and add this requirement designation to selected students.

Click the Printer Friendly Version button to print a copy of the grade roster.

On the Grade Roster page, the values that are available in the add this grade to all students field and the Roster Grade field are those for which the Include in Self Service check box on the Grading Scheme Table page is selected.

The add this requirement designation to all students field appears only for classes that meet all of the following conditions:

- The class has a requirement designation that has a separate grade.
- The Grade Roster Type value is *Final Grade.*
- The Approval Status value is *Not Reviewed.*

The Converted Roster Grade field appears on the Grade Roster page when at least one roster grade has a value defined in the Convert to Grade field on the Grading Scheme Table page.

On the Grade Change Request page, the values that are available in the Official Grade field are those for which the Include in Self Service check box on the Grading Scheme Table page is selected.

Viewing Self-Service Class Rosters

This section lists the pages that instructors use to view class rosters through self-service.

Pages Used to View Self-Service Class Rosters

Page Name	***Definition Name***	***Navigation***	***Usage***
Class Roster	SS_FAC_CLASS_ROST	• Self Service, Faculty Center, Class Roster • Self Service, Faculty Center, My Schedule Click the Class Roster icon for a class or the Class Roster subtab.	Instructors view the students who are enrolled in a class, have dropped a class, or are on the wait list for a class. Instructors can display student photos on the class roster.
Send Notification	SSS_NOTIFY	Click the Notify Selected Students or Notify All Students link on the Self-Service Class Roster page.	Instructors send email notifications to selected students or all students in a class. If a notification failure occurs, the sender receives a returned email indicating the type of failure, for example, host unknown.
Students Without Email Address	SSR_NO_EMAIL	This page appears when you click the Notify All Students link and there are students on the class roster who do not have email addresses in the system.	Displays the students on the class roster who do not have email addresses.
Printer Friendly Version	SS_FAC_CLSRSTR_PRT	Click the Printer Friendly Version link on the Self Service Class Roster page.	Displays a printer-friendly version of the class roster.

Using LMS Authentication

When you use PeopleSoft authentication, instructors can use self-service pages to link to their Learning Management System (LMS).

An LMS icon appears next to LMS classes on the Faculty Center - My Teaching Schedule page when a provider for authentication is identified or when an LMS URL is provided on the Schedule of Classes - LMS Data page.

Instructors can also access a list of LMS providers and select the appropriate provider link to directly access their home page in that LMS provider's website.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Managing Interoperability for LMSs"

My Oracle Support, PeopleSoft Student Records, "Configuring Your Learning Management System Third-Party Vendors for PeopleSoft Campus Solutions"

Pages Used for Instructor Self-Service Pages and LMS Authentication

Page Name	*Definition Name*	*Navigation*	*Usage*
My Schedule	INSTR_CLASS3	Self Service, Faculty Center, My Schedule Click the Learning Management button.	Instructors transfer directly to the academic content for the specified class within the external LMS.
Learning Management Systems	LMS_TARGET_SELECT	Self Service, Learning Management Systems	Review a list of Learning Management System providers used by the institution. Click one of the links to be taken directly to the external LMS.

Using the LMS Icon to Access the LMS Website

Instructors can access the My Schedule self-service page and click the LMS icon to access the appropriate external LMS site.

When an LMS provider is identified for authentication and the instructor clicks the LMS icon, the system authenticates the user and directly accesses the academic content for the specified class within the external LMS. With authentication, the instructor does not have to log in to the external site.

If instead of a provider an LMS URL is specified, no authentication takes place. The system accesses the specified URL, such as an instructor's website, where a log may be required.

If neither an LMS provider nor an LMS URL are assigned to the class, the LMS icon does not appear.

Using the Provider Link to Access the LMS Site

Instructors can use the Learning Management System self-service page and click the LMS provider link to access the appropriate external LMS site. The system performs the authentication and transfers them directly to their home page in that provider's website. Because instructors are not tied to an institution, all providers are displayed when the Display as Provider Link is selected on the LMS Provider setup page.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Managing Interoperability for LMSs," Defining LMS Providers

Chapter 12

Using Self-Service Course Catalog and Schedule

Students, instructors, and community members use the self-service Class Search feature to search the schedule of classes for a specific institution and term, and the Browse Course Catalog feature to view courses offered at the institution. Students can access class search from several places within PeopleSoft Campus Self Service, and they can select classes directly from class search, even if they do not access class search through enrollment navigation. Instructors can access class search through the Faculty Center in Campus Self Service. They can see classes in their search results that do not appear to students because the Schedule Print check box for those classes has been cleared on the Maintain Schedule of Classes - Basic Data page.

The navigation tabs that are used in self-service class search are defined on the Navigation Tabs Setup page.

See Also

Chapter 3, "Setting Up Self-Service Navigation," page 9

Searching for Classes Using Self-Service Pages

This section provides prerequisites and discusses how to:

- Select search criteria and search for classes.
- Review class search results.
- View class search details.
- Browse the course catalog.
- Review course catalog details.

Prerequisites

Configure self-service class search on the Class Search Setup and Display in Class Search pages.

See Also

Chapter 5, "Setting Up Student Records Self-Service," Defining Class Search Setup, page 26

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Establishing Terms and Sessions," Defining Term Values

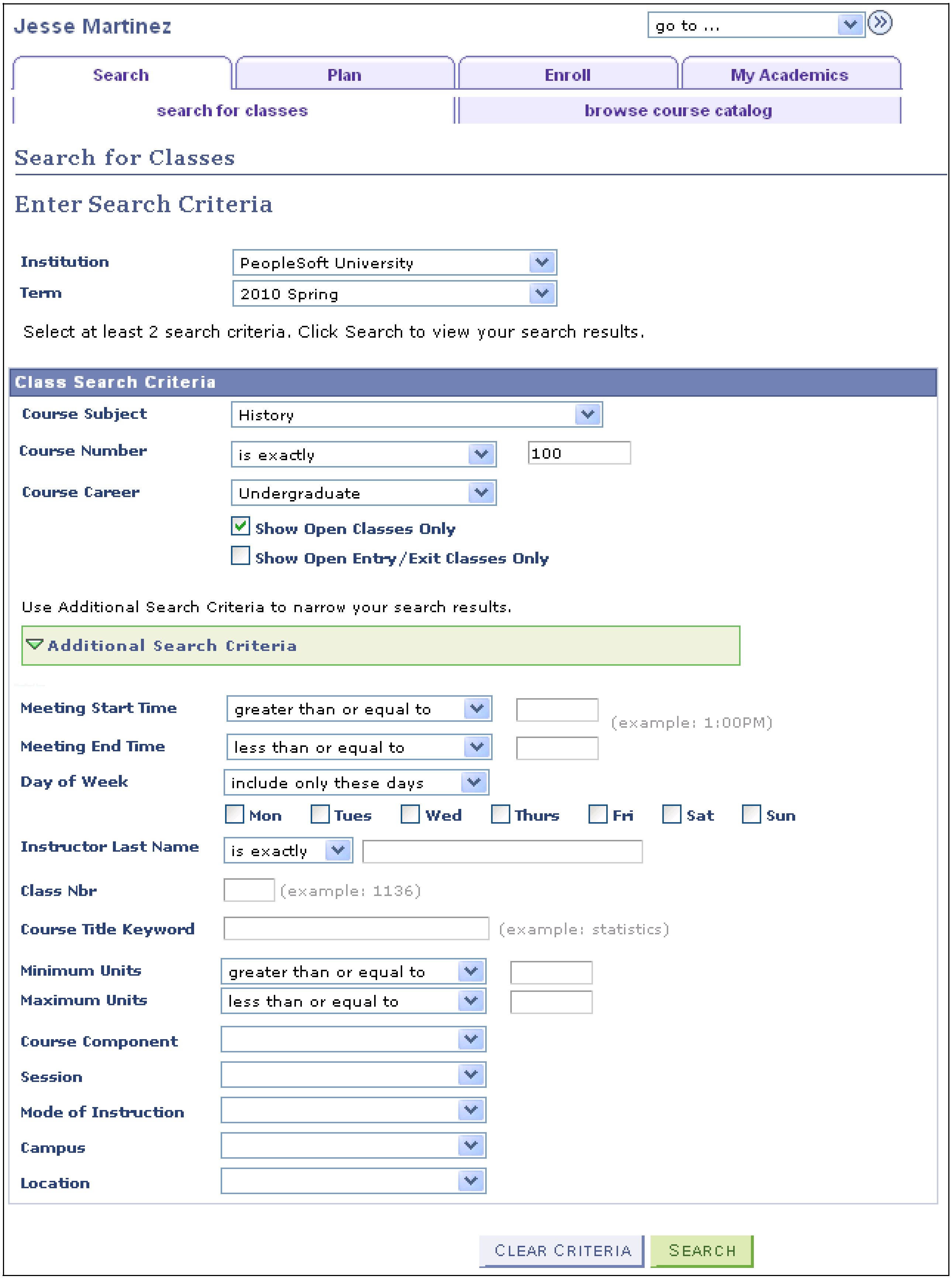
Pages Used to Search for Classes Using Self-Service Pages

Page Name	***Definition Name***	***Navigation***	***Usage***
Search for Classes - Search Criteria	SSR_CLSRCH_ENTRY	• Self Service, Search, Search for Classes • Self Service, Student Center Click the Search link. • Self Service, Academic Planning, My Planner Click the Search tab. • Self Service, Academic Planning, Enrollment Shopping Cart Click the Search link. • Self Service, Class Search/Browse Catalog • Self Service, Enrollment, Enrollment: Add Classes Click the Class Search option. Click the Search link. • Self Service, Enrollment, Enrollment: Swap Classes Click the Class Search option. Click the Search link.	Users specify the academic institution and term in which they want search for classes. Users enter search criteria and retrieve results.
Search for Classes - Search Results	SSR_CLSRCH_RSLT	Click the Search button on the Search for Classes page.	Review all classes that match the search criteria.

Page Name	***Definition Name***	***Navigation***	***Usage***
Search for Classes - Class Detail	SSR_CLSRCH_DTL	Click a class section on the Search for Classes - Search Results page.	Review detail for a specific class.
Browse Course Catalog	SSS_BROWSE_CATLG	• Self Service, Search, Browse Course Catalog • Self Service, Class Search/Browse Catalog, Browse Course Catalog • Self Service, Student Center Click the Search link. Click the Browse Course Catalog tab. • Self Service, Academic Planning, My Planner Click the Browse Course Catalog button.	Browse the course catalog to see a list of courses offered at the institution.
Browse Course Catalog - Course Detail	SSS_CRSE_OFFER_DTL	Click a course title on the Browse Course Catalog page.	View course details and access class sections.

Selecting Search Criteria and Searching for Classes

Access the Search for Classes page (click the Search link).


Jesse Martinez
go to ...
Search
Plan
Enroll
My Academics
search for classes
browse course catalog
Search for Classes
Enter Search Criteria
Institution
PeopleSoft University
Term
2010 Spring
Select at least 2 search criteria. Click Search to view your search results.
Class Search Criteria
Course Subject
History
Course Number
is exactly
100
Course Career
Undergraduate
Show Open Classes Only
Show Open Entry/Exit Classes Only
Use Additional Search Criteria to narrow your search results.
Additional Search Criteria
Meeting Start Time
greater than or equal to
(example: 1:00PM)
Meeting End Time
less than or equal to
Day of Week
include only these days
Mon
Tues
Wed
Thurs
Fri
Sat
Sun
Instructor Last Name
is exactly
Class Nbr
(example: 1136)
Course Title Keyword
(example: statistics)
Minimum Units
greater than or equal to
Maximum Units
less than or equal to
Course Component
Session
Mode of Instruction
Campus
Location
CLEAR CRITERIA
SEARCH

Search for Classes - Enter Search Criteria page

Note. Students can also search for classes through self-service My Planner, My Requirements, and Browse Course Catalog pages. From those pages, students can select a course description to access the course detail; from there they can view class sections that are offered for a specified term.

Institution

When accessed by a student through self-service navigation, the institution appears as default from the student's row in the STD_CAR_TERM table.

Term

When accessed by a student from Class Search, the student's user preference term appears. When accessed from Add Classes or Swap Classes, the term selected appears here.

When accessed by a student from Class Search, the term drop down only includes terms that are valid as defined in the Display Term in Class Search date range on the Term Values Table.

Note. The Term field on the Search for Classes page changes from a drop-down list box to a search prompt if the selected institution has more than 300 terms.

Course Subject

This field changes from a drop-down list box to a select subject button if the selected institution has more than 300 course subjects or if the Class Search Subject Option field on the Student Records Installation page is set to *Prompt Search.*

Note. Users at multi-institution organizations can select the drop-drop list box option on the Student Records Installation page. However the Course Subject field on the Search for Classes page will dynamically change to a select subject button for institutions with more than 300 course subjects.

Course Career

The student's academic career appears by default.

Meeting Start Time

To narrow search results by meeting start time, select one of the following:

greater than: Finds classes with a meeting start time later than the specified time. For example, if you enter greater than 1:00PM, the system would only retrieve classes that have a meeting start time later than 1:00 PM.

greater than or equal to: Finds classes with a meeting start time at or after the specified time.

less than: Finds classes with a meeting start time earlier than the specified time.

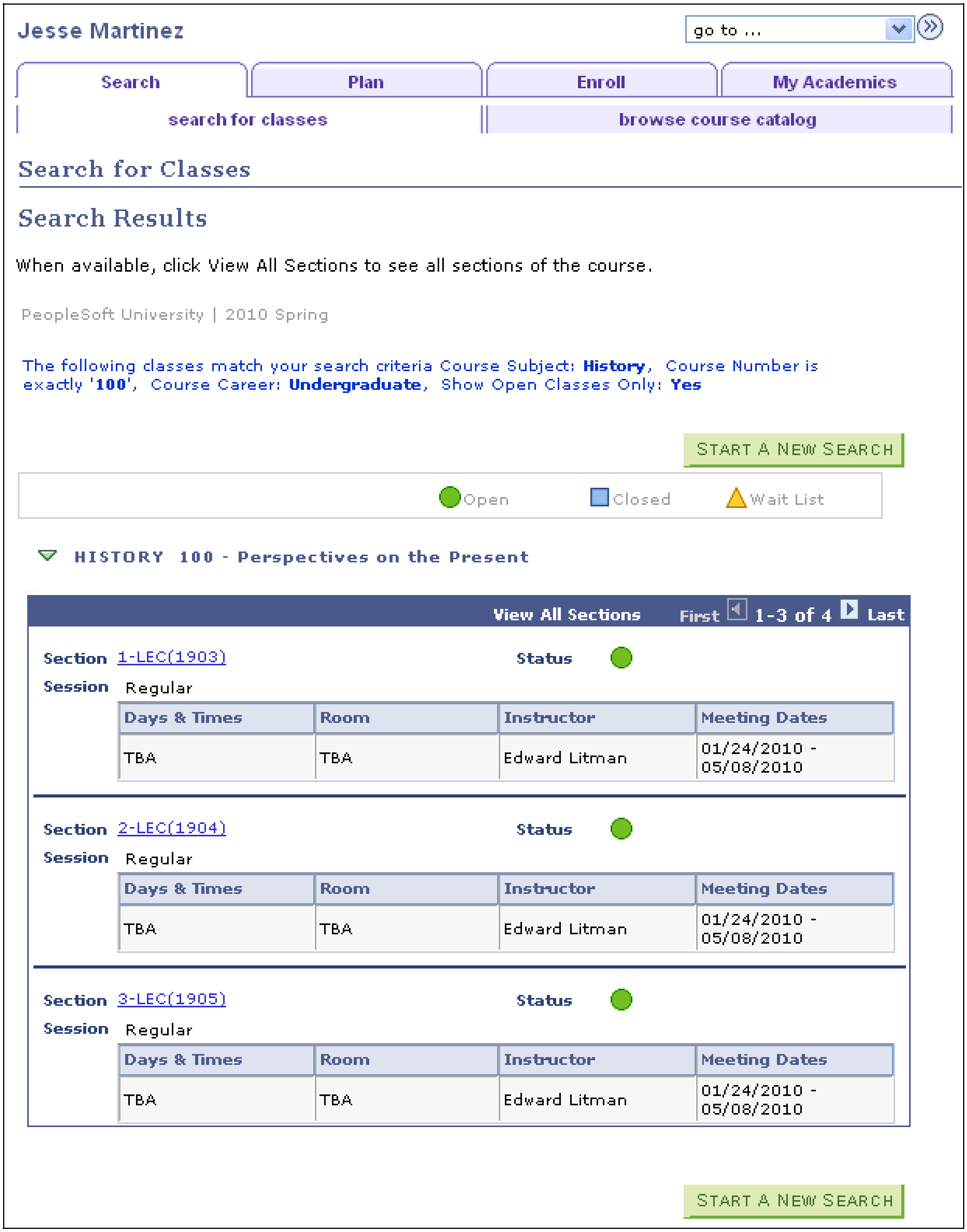
less than or equal to: Finds classes with a meeting start time at or earlier than the specified time.

is exactly: Finds classed with a meeting start time that is exactly at the specified time.

Meeting End Time	To narrow search results by meeting end time, select one of the following: greater than: Finds classes with a meeting end time later than the specified time. For example, if you enter greater than 1:00PM, the system would only retrieve classes that have a meeting end time later than 1:00 PM., such as 2:00 PM. greater than or equal to: Finds classes with a meeting end time at or after the specified time. less than: Finds classes with a meeting end time earlier than the specified time. less than or equal to: Finds classes with a meeting end time at or earlier than the specified time. is exactly: Finds classed with a meeting end time that is exactly at the specified time.
Day of Week	To narrow search results by day of week, select one of the following: *Include Only These Days:*. Finds classes that meet on the selected days. For example, if you select Monday and Thursday, the system will retrieve all classes that meet on Mondays and Thursdays only or Mondays, Thursdays, and other days. *Include Any of These Days:*. Finds classes that meet on at least one of the selected days. So if you select Monday and Thursday, the system will retrieve all classes that meet On Monday only, Thursday only, or Mondays or Thursdays and other days. *Exclude Any of These Days:* Finds classes that do not meet on either of the selected days. *Exclude Only These Days:* Finds classes that do not meet on both of the selected days.
Minimum Units	To narrow search results by minimum units, select one of the following: greater than: Finds classes with minimum units greater than the specified units. greater than or equal to: Finds classes with minimum units equal to or greater than the specified units. less than: Finds classes with minimum units less than the specified units. less than or equal to: Finds classes with minimum units less than or equal to the specified units. is exactly: Finds classes with minimum units that are exactly the specified units.
Maximum Units	To narrow search results by maximum units, select one of the following: greater than: Finds classes with maximum units greater than the specified units. greater than or equal to: Finds classes with maximum units equal to or greater than the specified units. less than: Finds classes with maximum units less than the specified units. less than or equal to: Finds classes with maximum units less than or equal to the specified units. is exactly: Finds classes with minimum units that are exactly the specified units.

Reviewing Class Search Results

Access the Search for Classes - Search Results page (click the Search button on the Search for Classes page).



Search for Classes - Search Results page

Wait List This icon only appears in the legend if you select the Use Wait Listing check box on the Self Service - Student Records Setup page. Likewise, if you clear the Use Wait Listing check box, the search results will either have a status of open or closed for classes.

Note. The Schedule Print check box on the Maintain Schedule of Classes - Basic Data page indicates whether a class section appears in the student and visitor class search results or on the printed class schedule. For instructors and advisors, all class sections are displayed in class search results. The message "Section not shown to students" is displayed for those class sections for which the Schedule Print check box is cleared.

Viewing Class Search Details

Access the Search for Classes - Class Detail page (click a class section on the Search for Classes - Search Results page).


Jesse Martinez
go to ...
Search
Plan
Enroll
My Academics
search for classes
browse course catalog
Search for Classes
Class Detail
HISTORY 100 - 1 Perspectives on the Present
PeopleSoft University | 2010 Spring | Lecture
VIEW SEARCH RESULTS
Class Details
Status Open
Class Number 1903
Session Regular Academic Session
Units 3 units
Instruction Mode In Person
Class Components Lecture Required
Career Undergraduate
Dates 1/24/2010 - 5/8/2010
Grading Student Option
Location Hacienda
Campus Main Hacienda Campus
Meeting Information
Days & Times Room Instructor Meeting Dates
TBA TBA Edward Litman 01/24/2010 - 05/08/2010
Class Availability
Class Capacity 35
Enrollment Total 1
Available Seats 34
Wait List Capacity 0
Wait List Total 0
Description
Perspectives on the Present
Textbook/Other Materials
Special Instructions Additional articles will be assigned throughout the term and will be available in the History dept office
Textbook
Status Required
ISBN 9870670044795
The American Future: A History, Author: Simon Schama, Publisher: Harper Luxe, Year Published: 2009, Price: 29.000000 USD
Status Required
ISBN 9870131777644
The World: A History, Volume 1, Author: Felipe Fernandez-Armesto, Publisher: Prentice Hall, Edition: 2nd, Year Published: 2009, Price: 104.000000 USD
Article
Status Recommended
The Nation Magazine - Feb 2006, Notes: Renewing America article

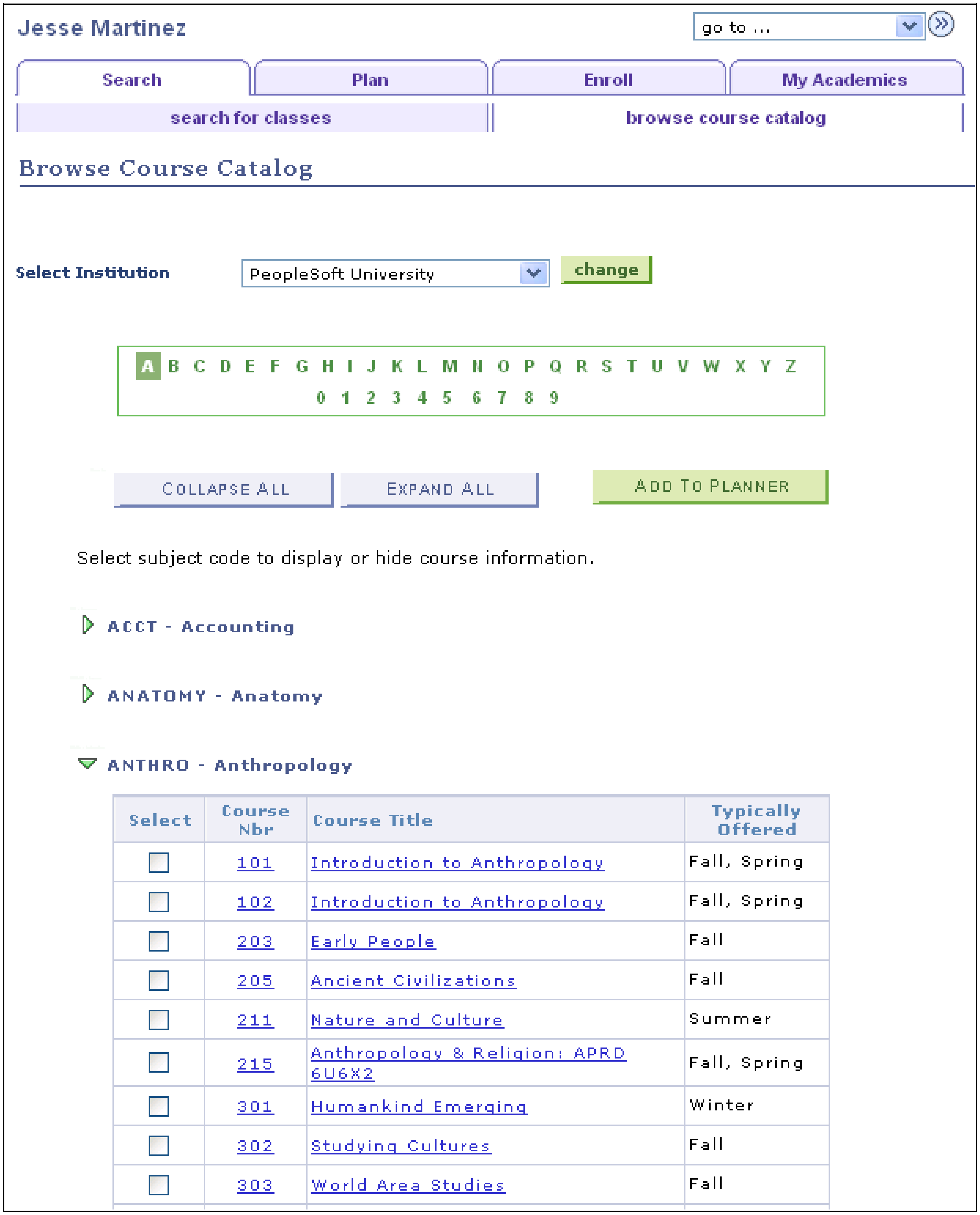
Search for Classes - Class Detail page

This page displays all information from the course catalog, plus class schedule information. However, you can control what information appears on this page for students and faculty who access the page through self-service navigation. Use the Class Search Setup page to determine which information appears on this page to students and faculty.

See Also: PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook, Setting Up Student Records Self Service

Browsing the Course Catalog

Access the Browse Course Catalog page (Self Service, Class Search/Browse Catalog, Browse Course Catalog).

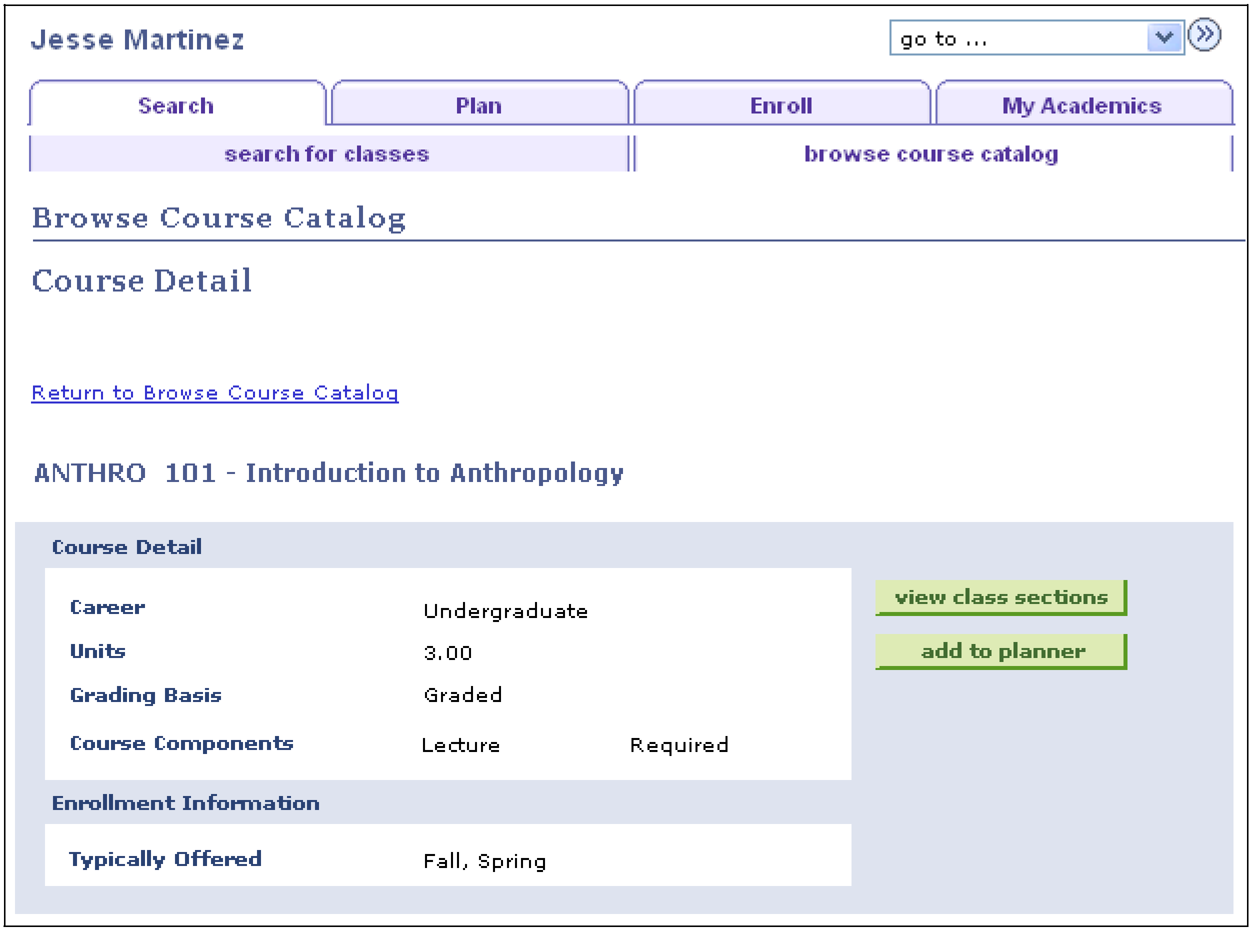


Browse Course Catalog page

Students and instructors can browse the course catalog by academic subject. Students can also select courses to add to their planner. If they click a Course Nbr (course number) or course title, they can view the course details and also view section information for the indicated term. Students with a single career are able to add courses to their planner directly from the Browse Course Catalog page or from the Course Detail page. Students with multiple careers are only able to add courses to their planner from the Course Detail page.

Reviewing Course Catalog Details

Access the Browse Course Catalog - Course Detail page. (click a course title on the Browse Course Catalog page).



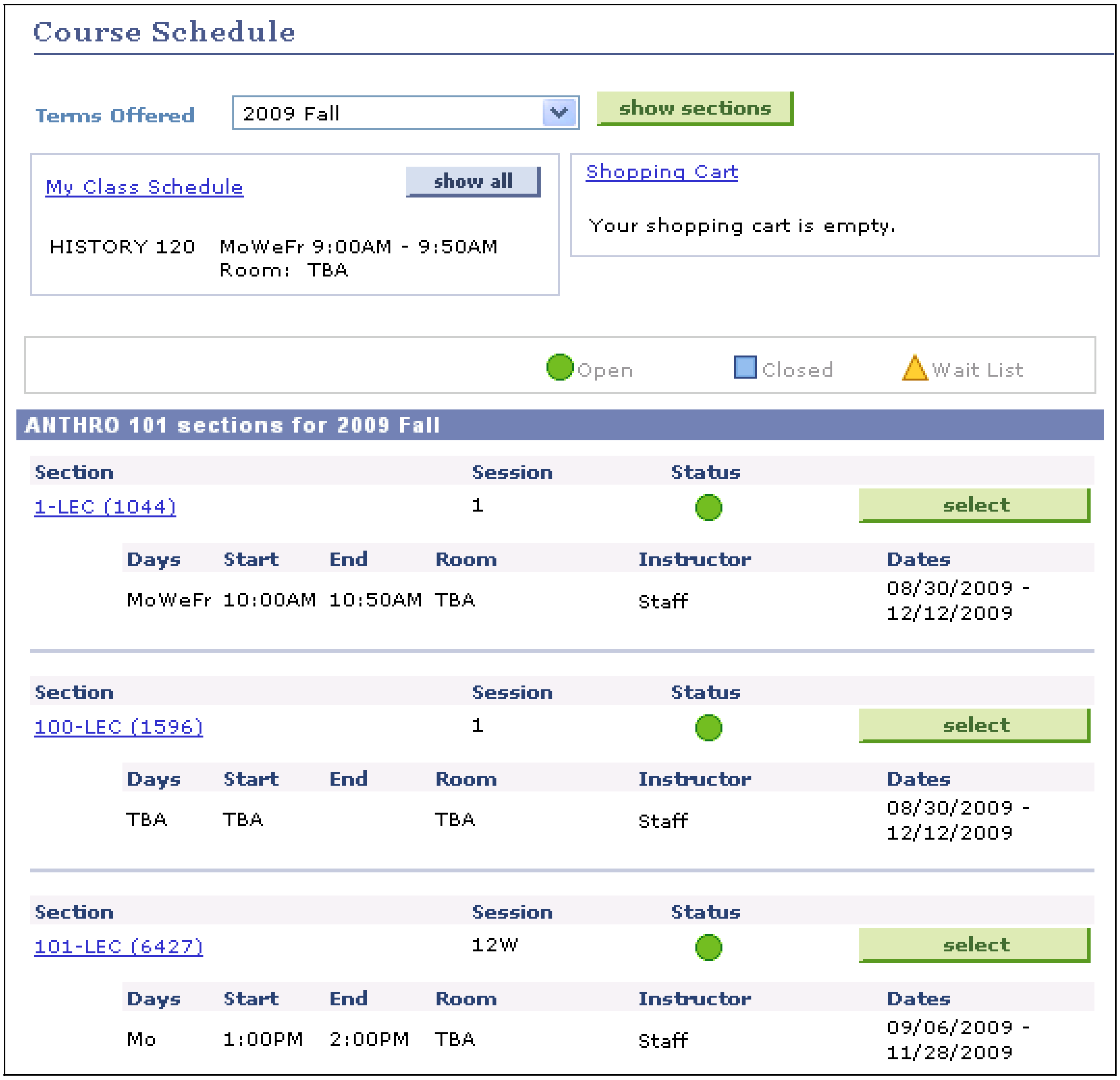
Browse Course Catalog - Course Detail page (1 of 2)

Students and instructors can click the view class sections button to view the course schedule details on this page.

Course Schedule

Students and instructors can select a term and click the show sections button to view class sections for the course. The Terms Offered drop down list box only includes: terms that are valid as defined in the Display Term in Class Search date range on the Term Values table, and those with sections scheduled within the term. For students, the select button only appears if the Enrollment & Shopping Cart date range on the Term Table under Display in Self-Service in Term Drop Down is valid.

See *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Establishing Terms and Sessions," Defining Terms, Sessions, and Session Time Periods.



Browse Course Catalog - Course Detail page (2 of 2)

Chapter 13

Using Self-Service Academic Planning

This chapter discusses how students can:

- Plan courses.
- Maintain the enrollment shopping cart.
- View course history.

See Also

Chapter 5, "Setting Up Student Records Self-Service," page 21

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Reviewing Installation Setup and System Defaults"

Prerequisites

Before students can use self-service academic planning features, the student must have a user ID in the system. The student must also be matriculated and have a role that includes security access to My Planner.

Planning Courses

This section discusses how students plan courses using My Planner functionality.

The navigation tabs that are used in self-service academic planning are defined on the Navigation Tabs Setup page.

See Also

Chapter 3, "Setting Up Self-Service Navigation," page 9

Understanding My Planner

Self-service My Planner functionality provides students with a tool to plan their courses for an individual term, multiple terms, or for their entire stay at the institution. After students add courses to their planner, they can proceed directly from planning to enrollment. Students with multiple careers are provided with a planner for each career.

The Planner differs from the enrollment shopping cart in the following way: the shopping cart requires students to add scheduled class sections to their cart, whereas the planner enables students to accomplish long-range planning by adding courses to their planner, whether or not the class schedule has been created for future terms.

When students access My Planner, past terms are collapsed while current and future terms are expanded. Current and future terms are determined by the Student Planner date range defined on the Term table under Display In Self-Service in Term Drop Down.

Depending on your Installation Student Administration setup, you can implement the planner using one of the following: Academic Advisement or Program Guide. If the institution does not use either, then the planner still works exclusively with Browse Course Catalog. To disable the planner, remove My Planner security; the planner page and references to planner will be hidden.

My Planner includes three ways for students to take action. They can:

- Add courses to their planner using the Browse Course Catalog or Plan by my Requirements buttons.
- Assign courses to a projected term.

  TheMove selected courses to Term drop down list box only includes terms that are valid as defined in the Student Planner date range on the Term Table under Display In Self-Service in Term drop down list box.
- View planned courses by term and proceed to enroll in a course when enrollment becomes available for the term. Students can enroll in planned courses from My Planner by selecting the course description to access the course detail and view sections scheduled for a selected term; students can then select the section for which they want to enroll. Students can also enroll in planned courses from the shopping cart, add, and swap pages.

Page Used to Plan Courses

Page Name	***Definition Name***	***Navigation***	***Usage***
My Planner	SSS_MY_PLANNER	• Self Service, Academic Planning, My Planner • Click the Plan link on the Student Center page.	Students plan courses based on their academic requirements or by browsing the course catalog.

Page Name	***Definition Name***	***Navigation***	***Usage***
Plan by My Requirements	SAA_SS_DPR_ADB	Click the Plan by my Requirements button on the My Planner page.	Students review a comprehensive list of their degree requirements and access course details linked to a particular requirement. Students can add courses to their planner and view class sections offered for a selected term from the Course Details page. Term activated students also have the option of directly adding classes to their shopping cart and proceeding to enrollment.
Browse Course Catalog	SSS_BROWSE_CATLG	Click the Browse Course Catalog button on the My Planner page.	Students can review all active courses within the course catalog and add courses valid for their institution and career to their planner. As with Plan by My Requirements, students are able to drill down on the Course Detail page to view class sections for a selected term and, if term activated, to directly add classes to their shopping cart.
My Planner - Requirements	SSS_MY_PLANNER_REQ	Self Service, Academic Planning, My Planner Click the  requirement icon.	The requirement icon appears on the My Planner page when a student adds a course to the planner from the Plan by My Requirements or My Academic Requirements pages. When students select the icon, the requirement details indicate the requirement from which the course was added. If, when evaluating the course work, the course is used for a different requirement, the system provides additional information.
Browse Course Catalog - Course Detail	SSS_CRSE_OFFER_DTL	Click a course title on the Browse Course Catalog page.	View course details and access class sections.

Maintaining the Enrollment Shopping Cart

This section discusses how students maintain their course selections using shopping cart functionality.

Understanding the Shopping Cart

Shopping cart functionality enables students to plan enrollment in class sections for a particular term. Students can validate their class sections to check for common problems such as time conflicts and prerequisites. Students can add classes to the shopping cart using My Planner or the My Requirements feature.

The system stores a student's class selections for a particular term and the student can access them as long as the term is available for enrollment. A class remains in the cart until the student is successfully enrolled or decides to delete it.

Page Used to Maintain the Course Shopping Cart

Page Name	***Definition Name***	***Navigation***	***Usage***
Shopping Cart	SSR_SSENRL_CART	• Self Service, Academic Planning, Enrollment Shopping Cart • Click the Plan link on the Student Center page, then click the shopping cart tab.	Student manages stored course sections selected using My Planner or My Requirements.

Viewing Course History

This section discusses how students view their course history, which is a summary of all courses taken through the current term.

Page Used to View Academic History

Page Name	*Definition Name*	*Navigation*	*Usage*
My Course History	SSS_MY_CRSEHIST	• Self Service, Academic Planning, My Course History • Click the Plan link on the Student Center page, then click the course history tab.	Students can review information for courses taken, those they received transfer credit for, and those in progress. They can choose to show or hide courses from My Planner and the shopping cart. **Note.** This page is intended to provide an easy-to-read view of a student's progress; it is not intended to serve as a transcript of the student's academic record.

Chapter 14

Using Self-Service Academic Services

This chapter provides an overview of My Academics and discusses how to use self-service My Academics functionality.

Understanding My Academics

The My Academic self-service page provides students with their current program and plan information in a tree structure and also provides a set of links to important academic information.

The sections that My Academics displays are:

- Academic Requirements
- What-if Report
- Advisors
- Transfer Credit
- Course History
- Transcript
- Enrollment Verification
- Graduation

See Also

Chapter 22, "Using Academic Advisement Self Service," page 267

Chapter 16, "Using Self-Service Degree Progress/Graduation," page 155

Chapter 13, "Using Self-Service Academic Planning," Viewing Course History, page 140

Using Self-Service My Academics Functionality

Students can use the self-service My Academics functionality.

Pages Used to Use Self-Service My Academics Functionality

Page Name	***Definition Name***	***Navigation***	***Usage***
My Academics	SSS_MY_ACAD	Student Center, My Academics	Students can access high-level academic data and link to various tasks.
My Academic Requirements	SAA_SS_DPR_ADB	Click the View my advisement report link on the My Academics page.	Students can use this page to access the degree progress report, evaluate their degree progress, make decisions about what to enroll in next, and then either enroll in courses or add courses to their course planners.
What-if Report Selection	SAA_SS_WHATIF_SEL	• Click the Create a what-if scenario link on the My Academics page. • Self Service, Degree Progress/Graduation, View What-If Report	Students can request an advisement report based on what-if program and plan scenarios. Also, if the institution enables it, students can also run a course what-if report.
View My Advisors	SS_STDNT_ADVISR	• Click the View my advisors link on the My Academics page. • Self Service, Academic Records, View My Advisors	Students can view a list of their assigned advisors by academic institution, career, program, and plan.
Send Notification	SSS_NOTIFY	Click the Notify Selected Advisors or the Notify All Advisors links on the View My Advisors page.	Students send email notifications to one or more of their advisors. If a notification failure occurs, the sender receives a returned email indicating the type of failure, for example, host unknown.
Evaluate My Transfer Credit	SS_TRCR_SRCH	• Click the Evaluate my transfer credits link on the My Academics page. • Self Service, Transfer Credit, Evaluate My Transfer Credit	Students can evaluate any transfer credits.

Page Name	***Definition Name***	***Navigation***	***Usage***
View Transfer Credit Report	SS_TRCR_RPT	• Click the View my transfer credit report link on the My Academics page. • Self Service, Transfer Credit, View Transfer Credit Report	Students can view their Transfer Credit reports.
My Course History	SSS_MY_CRSEHIST	• Click the View my course history link on the My Academics page. • Self Service, Academic Records, My Course History	Students can review information for courses taken, those they received transfer credit for, and those in progress. They can choose to show or hide courses from My Planner.
View Unofficial Transcript	SSS_TSRQST_UNOFF	• Click the View my unofficial transcript link on the My Academics page. • Self Service, Academic Records, View Unofficial Transcript	Students can view their unofficial transcripts.
Request Official Transcript	SS_TSCRPT_OFF	• Click the Request official transcript link on the My Academics page. • Self Service, Academic Records, Request Official Transcript	Students can request official transcripts from the institution.
Request Enrollment Verification	SS_ENRL_VER_REQ	• Click the Request enrollment verification link on the My Academics page. • Self Service, Academic Records, Request Enrollment Verification	Students can request enrollment verification online or by mail, with multiple processing options.
Apply for Graduation	SS_GRAD_APPLY	• Click the Apply for graduation link on the My Academics page. • Self Service, Degree Progress/Graduation, Apply for Graduation	Students can select academic programs and apply for graduation.

Chapter 15

Using Self-Service Enrollment

This chapter provides an overview of self-service enrollment and discusses how students perform these self-service tasks:

- View a class schedule.
- Add classes.
- Drop classes.
- Swap classes.
- Edit classes.
- View term information.

Understanding Self-Service Enrollment

The self-service enrollment design integrates the various enrollment functions and enables students to build and make changes to their schedules from the same place in the system. A step-by-step wizard feature guides students through the enrollment processes of adding, dropping, swapping, and editing classes. Specifically, it guides students through the steps of selecting classes, defining options—such as wait list preferences—confirming selections, and reviewing results.

Additionally, a great degree of integration exists between the tasks of viewing appointment data, finding or browsing for classes, enrolling in classes, presenting error messages, and viewing enrollment information.

The navigation tabs that are used in self-service enrollment are defined on the Navigation Tabs Setup page.

See Chapter 3, "Setting Up Self-Service Navigation," page 9.

Self-Service Enrollment Shopping Cart Validation and Enrollment Messages

Oracle delivers a set of error and informational message sets exclusively for the Enrollment Shopping Cart Validation feature and self-service enrollment processing. These message sets enable the enrollment process to return more self-service-friendly messages. You can modify these messages to meet the specific needs of your students. You can view and make changes to these messages using the PeopleTools Message Catalog component (MESSAGE_CATALOG1) (PeopleTools, Utilities, Administration, Message Catalog).

These message sets are:

- Validation (Message Set 14632): These messages are returned when a student selects *Validate* on the Enrollment Shopping Cart page. The system returns a validation-specific message rather than a regular enrollment engine message. For example, if the validation process finds a time conflict, the message 14632, 17 is returned rather than the enrollment engine message 14640, 17.
- Enrollment (Message Set 14641): This message set is used for all messages received through self-service enrollment (excluding Enrollment Shopping Cart Validation). While actual enrollment is processed in the same way for self-service enrollment as when it is processed using an administrative user page, such as Quick Enroll, the fact that a request was submitted through self-service enrollment now causes the system to return a self-service-specific error or informational message. For example, if an enrollment request submitted through the Quick Enroll component (QUICK_ENROLL) returns message 14640, 17 (time conflict), the same request submitted through self-service returns the self-service-specific message 14641,17. This enables more appropriate self-service messaging, without changing the messages used for non-self-service, administrative users.

See Also

Chapter 12, "Using Self-Service Course Catalog and Schedule," Searching for Classes Using Self-Service Pages, page 123

Enterprise PeopleTools PeopleBook: System and Server Administration, "Using PeopleTools Utilities, Using Administration Utilities, Message Catalog"

Viewing a Class Schedule

This section lists the pages that students use to view their class schedule from self-service pages.

Pages Used to View a Class Schedule

Page Name	*Definition Name*	*Navigation*	*Usage*
My Class Schedule	SSR_SSENRL_LIST	• Self Service, Enrollment • Student Center, Enroll, My Class Schedule	Students use this page to view their class schedules for a term.
Textbook Summary	SSR_SSCLSTXB_SUM	Click the View Textbook Summary link on the My Class Schedule page.	Students can view textbook assignments for each of their classes. The link is available if you select the Display Textbook Summary link – Student Self Service check box on the Other page in the Student Records setup component (SSR_SS_ENRL_OPT).

Page Name	Definition Name	Navigation	Usage
Weekly Schedule	SS_WEEKLY_SCHEDULE	• Self Service, Enrollment, My Class Schedule Select the Weekly Calendar View option. • Self Service, Enrollment, View My Weekly Schedule	Students use this page to view their weekly schedules. **Note.** Before students can view their weekly schedules, you must define weekly schedule time periods. See Chapter 5, "Setting Up Student Records Self-Service," Setting Up Weekly Schedule Time Periods, page 30.
Academic Calendar Deadlines	ACAD_CAL_DATES	Click the Academic Calendar Deadlines icon on the My Class Schedule page.	Students use this page to view drop, cancel, and withdrawal deadlines for a class on their class schedules. The page also enables students to access Gradebook and the Learning Management System if the institution sets up the connections.

Adding Classes

This section lists the pages that students use to add classes to their schedules from Campus Self Service.

Pages Used to Add Classes

Page Name	Definition Name	Navigation	Usage
Add Classes	SSR_ENRL_CART	• Self Service, Enrollment, Enrollment: Add Classes • Student Center, Enroll, add	Students can use this page to request enrollment in classes for a term.
Related Class Sections	SSR_CLS_RELCOMP	Click the Next button on the Add Classes page.	Students use this page to select related class sections to add.

Page Name	Definition Name	Navigation	Usage
Add Classes - Select Classes to Add - Enrollment Preferences	SSR_CLS_DTLOPT	Click the Select a Class button on the Select Classes to Add - Class Detail page.	Students use this page to complete the information for their class enrollment requests.
Add Classes - Confirm Classes	SSR_SSENRL_ADD_C	Click the Next button on the Add Classes - Select Classes to Add - Enrollment Preferences page.	Students use this page to confirm their selections and initiate the enrollment engine.
Add Classes - View Results	SSR_SSENRL_RSLT	Click the Enroll button on the Confirm Classes page.	Students use this page to view the result of their enrollment request.

Dropping Classes

This section lists the pages that students use to drop classes from their schedules through Campus Self Service.

Pages Used to Drop Classes

Page Name	Definition Name	Navigation	Usage
Drop Classes	SSR_SSENRL_DROP	• Self Service, Enrollment, Enrollment: Drop Classes • Student Center, Enroll, drop	Students use this page to drop classes from their schedules.
Drop Classes - Confirm Your Selection	SSR_SSENRL_DROP_C	Click the Drop Classes button on the Drop Classes page.	Students use this page to confirm their selections.
Drop Classes - View Results	SSR_SSENRL_RSLT	Click the Next button on the Drop Classes – Confirm Your Selection page.	Students use this page to view the results of their drop requests.

Swapping Classes

This section lists the pages that students use to swap classes using self-service pages.

Pages Used to Swap Classes

Page Name	*Definition Name*	*Navigation*	*Usage*
Swap	SSR_SSENRL_SWAP	• Self Service, Enrollment, Enrollment: Swap Classes • Student Center, Enroll, swap	Students can use this page to request to swap an existing class enrollment within a term for a different class enrollment.
Select a class to swap - Enrollment Preferences	SSR_CLS_DTLOPT	Click the Select a Class button on the Select Classes to swap - Class Detail page.	Students use this page to complete the information for their class enrollment requests.
Swap Classes - Confirm your selection	SSR_SSENRL_SWAP_C	Click the Next button on the Select a class to swap - Enrollment Preferences page.	Students use this page to confirm their selections and initiate the enrollment engine.
Swap Classes - View Results	SSR_SSENRL_RSLT	Click the Next button on the Swap Classes - Confirm your selection page.	Students use this page to view the results of their swap requests.

Editing Classes

This section lists the pages that students use to edit their enrollment requests through Campus Self Service.

Pages Used to Edit Classes

Page Name	*Definition Name*	*Navigation*	*Usage*
Edit	SSR_SSENRL_EDIT	• Self Service, Enrollment, Enrollment: Edit a Class • Student Center, Enroll, edit	Students use this page to select a class to edit.
Select a class to edit - Enrollment Preferences	SSR_CLS_DTLOPT	Click the Next button on the Select Classes to edit - Class Detail page.	Students use this page to complete the information for their class enrollment requests.

Page Name	Definition Name	Navigation	Usage
Edit Class Enrollment Options - Confirm your Selections	SSR_SSENRL_EDIT_C	Click the Next button on the Select a class to edit - Enrollment Preferences page.	Students use this page to confirm their changes.
Edit Class Enrollment Options - View Results	SSR_SSENRL_RSLT	Click the Next button on the Edit Class Enrollment Options - Confirm your Selections page.	Students use this page to view the results of their changes.

Viewing Term Information

This section provides an overview of term information and discusses how to:

- Use LMS Authentication.
- Use the LMS Button to Access the LMS Website.

Understanding Term Information

The Term Information page provides students with a single access point that links to the following pages:

- Enrollment Dates.
- View Assignments and Grades.
- My Learning Management Systems.
- My Exam Schedule.
- View My Grades.

Pages Used to View Term Information

Page Name	Definition Name	Navigation	Usage
Term Information	SSR_SS_TERM_LINKS	Student Center, Enroll, Term Information	Students use links to access enrollment dates, assignments, learning management systems, exam schedules, and grades.

Page Name	Definition Name	Navigation	Usage
Enrollment Dates	SSR_SSENRL_APPT	Click the View my enrollment dates link on the Term Information page.	Students can view detail information about their enrollment appointments, such as start date, end date, start time, end time, and unit limits.
View Assignments and Grades	SS_LAM_STD_GR_LST	Click the View my class assignments and grades link on the Term Information page.	Students can view assignment and grade information for classes that use the Gradebook feature.
My Learning Management Systems	SSR_LMS_TARGET	Click the View learning management systems link on the Term Information page.	Students access a list of LMS providers and click the appropriate provider links to directly access their home pages in those LMS providers' websites. **Note.** For a provider link to appear on the My Learning Management Systems page, the Display as LMS Link must be selected on the LMS Provider page.
My Exam Schedule	SSR_SSENRL_EXAM_L SSR_SS_WEEK	Click the View my exam schedule link on the Term Information page.	Students view their exam schedule for a term.
View My Grades	SS_ES_GRADE_LIST	Click the View my grades link on the Term Information page.	Students can view final and midterm grades for a selected term.

Using LMS Authentication

When you use PeopleSoft LMS authentication, students and instructors can use self-service pages to view their class schedules or teaching assignments for a term.

An LMS button appears next to each LMS class on these pages either when a provider for authentication is identified or when an LMS URL is provided on the Schedule of Classes - LMS Data page. The LMS button works the same on the Student Center and My Class Schedule self-service pages for students and on the Faculty Center page for instructors.

Self-service users can also access a list of LMS providers and select the appropriate provider link to directly access their home page in that LMS provider's website.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Managing Interoperability for LMSs"

My Oracle Support, PeopleSoft Student Records, "Configuring Your Learning Management System Third-Party Vendors for PeopleSoft Campus Solutions"

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Managing Interoperability for LMSs," Defining LMS Providers

Using the LMS Button to Access the LMS Website

Self-services users can access the Student Center or My Class Schedule self-service page and click the LMS button to transfer to the appropriate external LMS site.

When an LMS provider is identified for authentication and the student clicks the LMS button on a self-service page, the system authenticates the user and directly accesses the academic content for the specified class within the external LMS. With authentication, the user does not have to log in to the external site.

If instead of a provider an LMS URL is specified, no authentication takes place. The system transfers the student to the specified URL, such as an instructor's website, where he or she might have to log in.

For students, the LMS button appears next to an LMS class if they are enrolled in that class and have not dropped or withdrawn from the class.

If neither an LMS provider nor an LMS URL is assigned, the LMS button does not appear.

Chapter 16

Using Self-Service Degree Progress/Graduation

This chapter discusses how to:

- View the Degree Progress report using self-service pages.
- Apply for graduation using self-service pages.

Viewing the Degree Progress Report Using Self-Service Pages

Students can view the Degree Progress report using pages in PeopleSoft Campus Self Service.

This section lists the pages used to view the Degree Progress Report using self-service pages.

Pages Used to View the Degree Progress Report Through Self-Service Pages

Page Name	Definition Name	Navigation	Usage
Degree Progress Report	SS_ES_AARPT_TYPE	Self Service, Degree Progress/Graduation, View Degree Progress Report	Students can request a Degree Progress report by selecting their institution and a report type, and then clicking the Go button.
Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on the Degree Progress Report page.	Students can run a quick what-if scenario.
Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on the Degree Progress Report page.	Students can run course list what-if scenarios.
Create What-If Scenario	SAA_SS_WHATIF	Self Service, Degree Progress/Graduation, View What-If Report Click the Create New Report button on the Report Selection page.	Students can run a create what-if scenario.

Page Name	**Definition Name**	**Navigation**	**Usage**
My Academic Requirements	SAA_SS_DPR_AAL	Self Service, Degree Progress/Graduation, My Academic Requirements	Students can view their planned or completed academic requirements.

Applying for Graduation Using Self-Service Pages

This section provides an overview of the self-service application process, lists a prerequisite, and lists the pages used to apply for graduation using self-service pages.

Understanding the Self-Service Application Process

Campus Self Service enables students to submit requests for graduation over the internet using a single self-service transaction. A successful self-service application updates a student's Program/Plan record with a new effective-dated row and program action of *Data Change.* The self-service application also updates the student's degree checkout status to *Applied.* You can use the Graduation Processing and Reporting feature to select this population of students and to track and update their degree checkout progress through graduation.

Later, degree checkout counselors and academic advisors who are evaluating and approving student applications for graduation can use the Graduation Reporting component (RUNCTL_GRAD_RPT) to query and identify a student as part of a larger student population in the system (students with a degree checkout status equal to *Applied).*

Prerequisite

Before students can use the self-service Apply for Graduation feature, you must define valid graduation terms on the Term Calendar 4 page. For each graduation term, you must specify a range of days during which a student must apply for the graduation term. For example, you can set up a term of fall 2005 with a valid date range of September 1, 2004, through August 15, 2005. Students who use the self-service Apply for Graduation feature between the dates of September 1, 2004, and August 15, 2005, see *Fall 2005* as one of the graduation term choices.

Pages Used to Apply for Graduation Using Self-Service Pages

Page Name	**Definition Name**	**Navigation**	**Usage**
Apply for Graduation - Select Program and Degree	SS_GRAD_APPLY	• Self Service, Degree Progress/Graduation, Apply for Graduation • Student Center, My Academics Click the Apply for Graduation link on the My Academics page.	Students view the academic programs for which they are eligible to apply for graduation.

Page Name	***Definition Name***	***Navigation***	***Usage***
Apply for Graduation - Select Graduation Term	SS_GRAD_APPLY2	• Self Service, Degree Progress/Graduation, Apply for Graduation • Click an academic program on the Apply for Graduation - Select Program and Degree page.	Students specify the graduation term for which they are applying.
Apply for Graduation - Verify Graduation Data	SS_GRAD_APPLY3	• Self Service, Degree Progress/Graduation, Apply for Graduation • Click the Continue button after selecting a graduation term. Alternatively, if applicable, select the Select Different Program button.	Students verify the accuracy of a request and then proceed to submit the request. Students also have the option to select a different program (if applicable) or a different term.
Apply for Graduation - Submit Confirmation	SS_GRAD_APPLY4	• Self Service, Degree Progress/Graduation, Apply for Graduation • Click the Submit Application button on the Apply for Graduation - Verify Graduation Data page.	Students receive confirmation from the system that their application for graduation was submitted successfully.

Chapter 17

Using Student Financials Self Service

This chapter provides an overview of the PeopleSoft Student Financials self-service application and discusses how students can:

- View outstanding charges, payments, financial aid, and refunds.
- Create credit card profiles.
- Make self-service payments.
- Purchase miscellaneous items.
- Use account services.

Understanding Student Financials Self Service

Students use Student Financials self service to view outstanding charges, payments, financial aid, and refunds; create and store credit card or eCheck payment profiles; make self-service payments, purchase miscellaneous items, and use account services. What students see when they access Student Financials self service depends on what your institution has defined on the setup pages. For example, you can use Institution Sets to specify not only that students view their account activity by business unit, term, or charge, but you can also decide whether to display payment history, pending payments, charges due, and financial aid totals.

See Chapter 6, "Setting Up Student Financials Self Service," Setting Up Institution Sets, page 38.

The navigation tabs that are used in Student Financials self service are defined on the Navigation Tabs Setup page.

See Also

Chapter 3, "Setting Up Self-Service Navigation," page 9

Viewing Outstanding Charges, Payments, Financial Aid, and Refunds

This section discusses how to:

- View an account summary.

- View account activity.
- View charges due details.
- View details by due date.
- View details by charge.
- View charges due details by due date.
- View invoices due detail.
- View invoice detail.
- View payment history.
- View the charges paid by a payment.
- View pending financial aid.

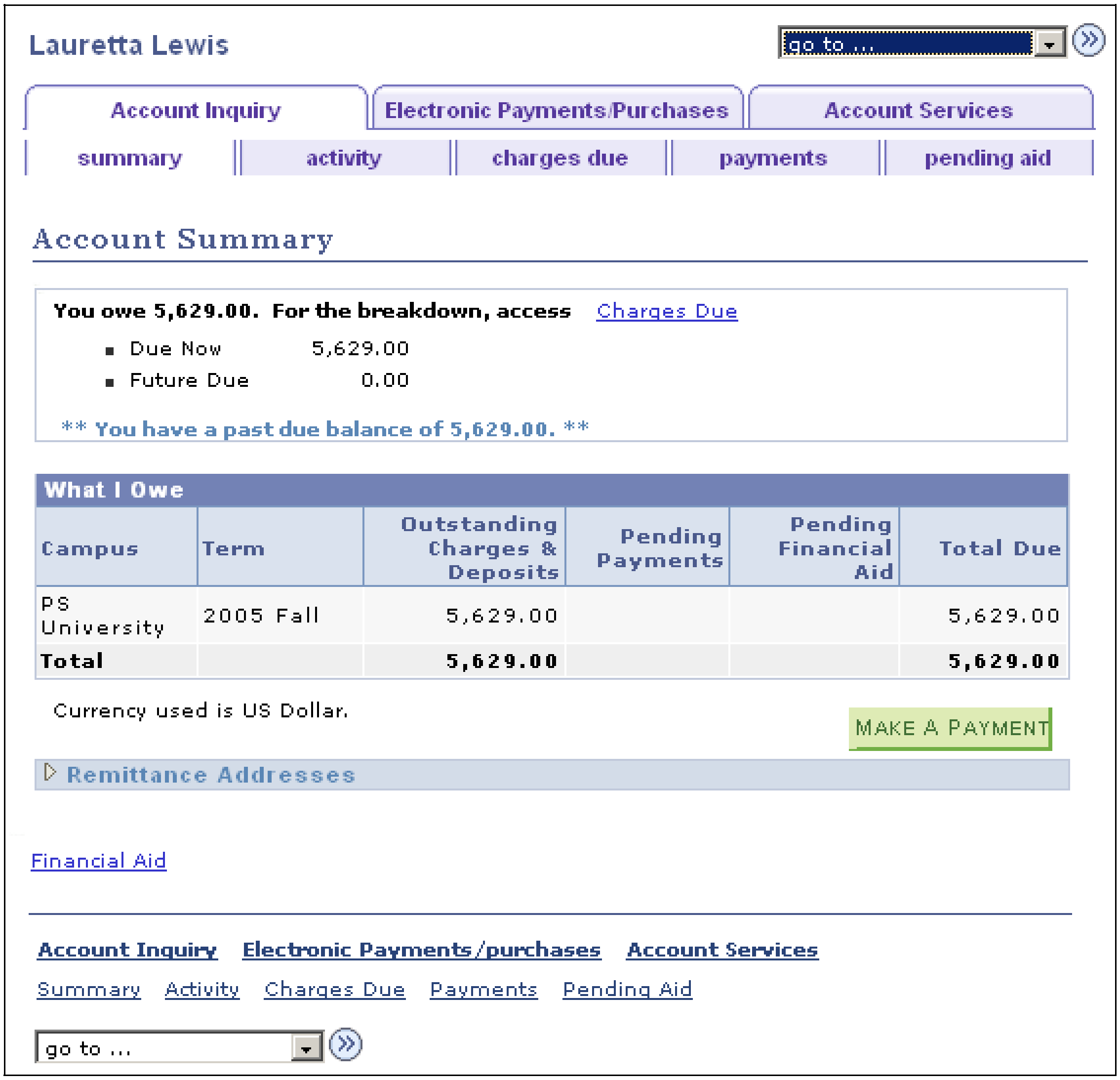
Pages Used to View Outstanding Charges, Payments, Financial Aid, and Refunds

Page Name	***Definition Name***	***Navigation***	***Usage***
Account Inquiry - Account Summary	SSF_SS_ACCT_SUMM	Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Summary	Review a summary of outstanding charges and deposits, pending payments, pending financial aid, and total due.
Account Inquiry - Account Activity	SSF_SS_ACCT_ACTVTY	Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Activity Click the Activity link or a tab on any page.	Review all of the account activity that has transpired over a fixed period of time. Account activity can include any transactions that have been posted to the student's account, including charges, cash, checks, credit card payments, financial aid, refunds, and so on. Administrators can suppress this page from appearing using the SF Institution Set setup.
Account Inquiry - Charges Due	SSF_SS_CHRGS_DUE	• Self Service, Campus Finances, Account Inquiry, Account Inquiry - Charges Due • Click the Charges Due link or a tab on any page.	Review all outstanding charges and deposits incurred to date, including charge details. Administrators can suppress this page from appearing to the student using the SF Institution Set setup.

Page Name	***Definition Name***	***Navigation***	***Usage***
Account Inquiry - Payment History	SSF_SS_PMT_HIST	Self Service, Campus Finances, Account Inquiry, Account Inquiry - Payments Click the Payments link or a tab on any page.	Review all payments posted to the account. Administrators can suppress this page from appearing to the student using the SF Institution Set setup. Administrators can select whether pending payments will appear on this page and whether students are permitted to drill down through posted payments to see which charges were reduced by those payments.
Account Inquiry - Pending Financial Aid	SSF_SS_PEND_FINAID	Self Service, Campus Finances, Account Inquiry, Account Inquiry - Pending Financial Aid Click the Pending Aid link or a tab on any page.	Review pending or anticipated aid that has yet been posted to the account. Pending financial aid amounts can be viewed by all terms or by specific terms. Administrators can suppress this page from appearing to the student using the SF Institution Set setup.

Viewing an Account Summary

Access the Account Inquiry - Account Summary page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Summary).



Account Inquiry - Account Summary page

Charges Due
Click to access the Charges Due page.

Due Now and **Future Due**
The amounts that appear are based on the parameters that are set up in the Days in future for 'due now' field on the Institution Set page. The formula used to calculate the value in the Due Now field is any charges incurred through today's date plus the number of days specified. The formula used to calculate the value in the Future Due field is any charges incurred after today's date plus the number of days specified.

Past Due Balance
This amount represents charges that were incurred through yesterday (current date minus 1).

See Chapter 6, "Setting Up Student Financials Self Service," Defining Basic Institution Set Parameters, page 39.

What I Owe Table

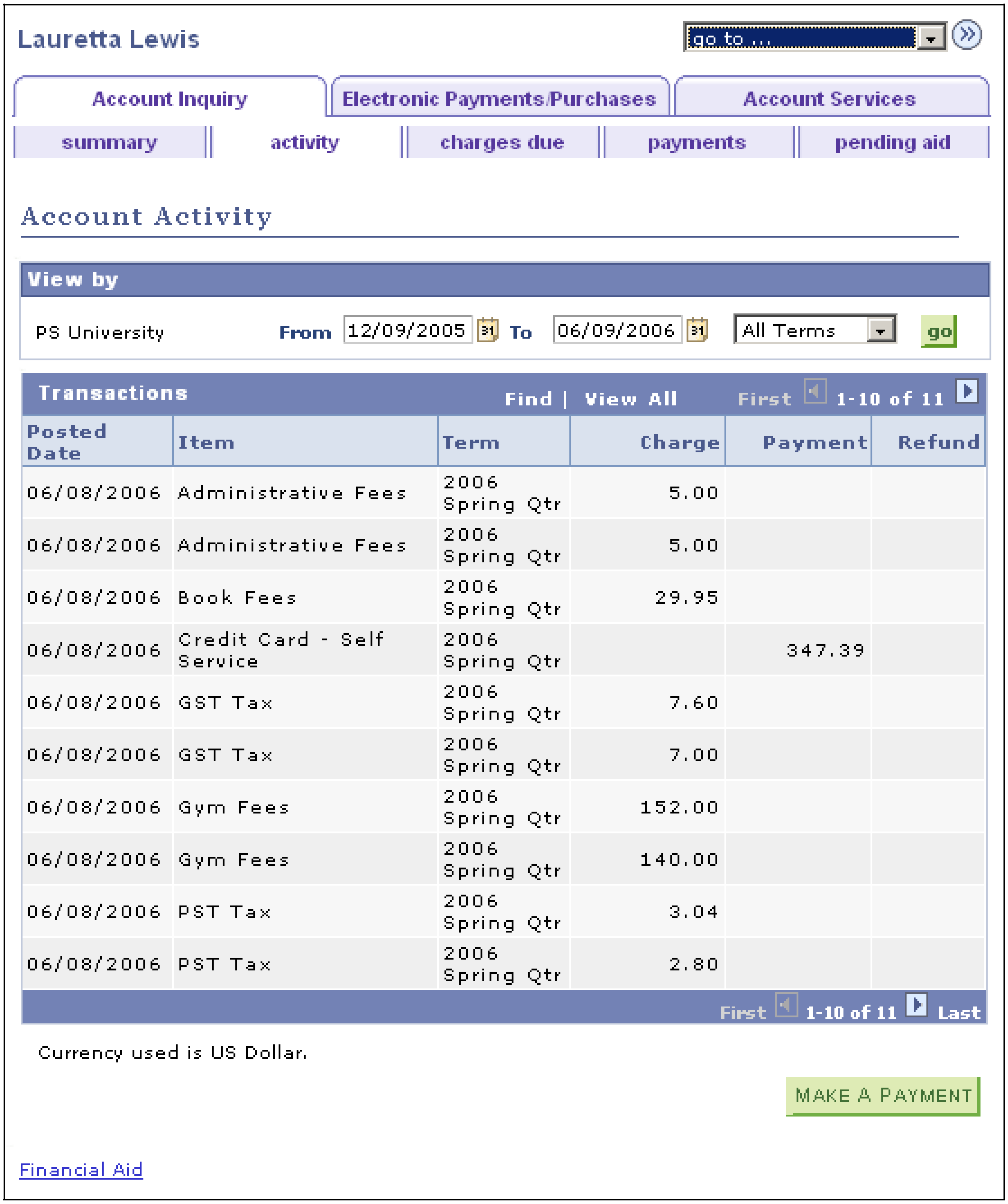
The columns that appear in the What I Owe table are based on the allocation level that you specified on the Institution Set page. An administrator can suppress the Pending Payments and Pending Financial Aid columns.

Remittance Addresses

The address that appears is based on the location that you selected on the SF Business Unit page.

Viewing Account Activity

Access the Account Inquiry - Account Activity page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Activity).



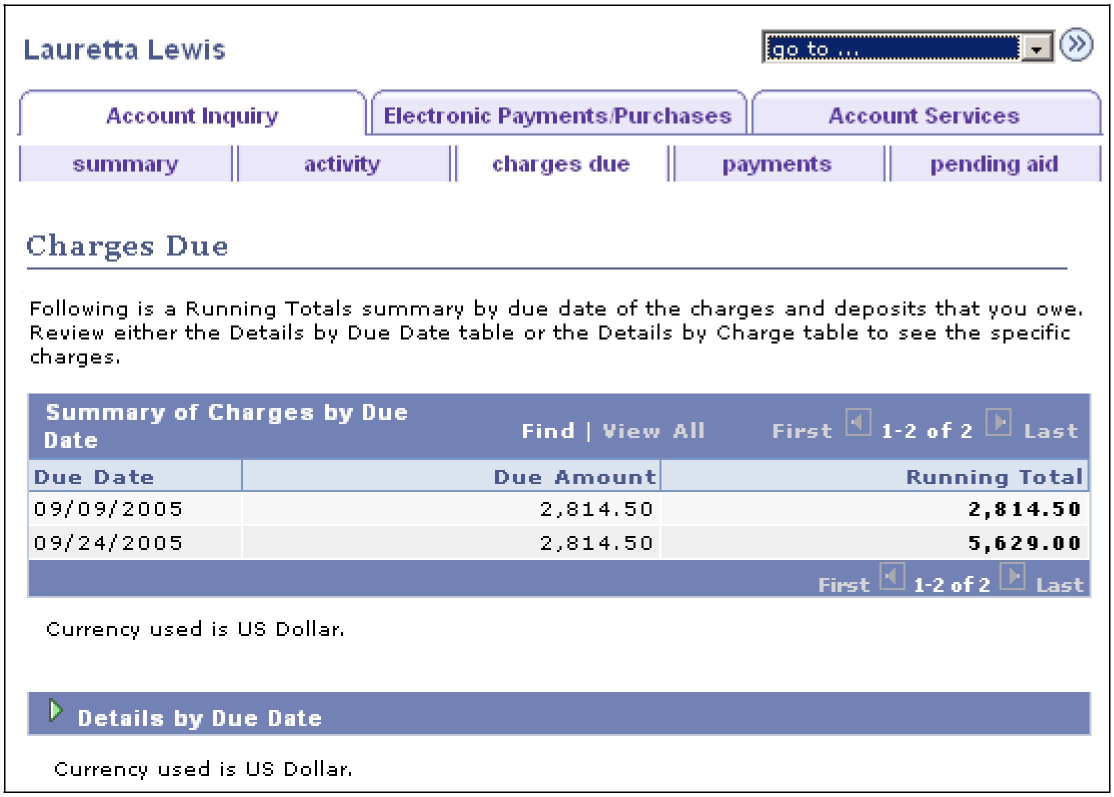
Posted Date	Item	Term	Charge	Payment	Refund
06/08/2006	Administrative Fees	2006 Spring Qtr	5.00		
06/08/2006	Administrative Fees	2006 Spring Qtr	5.00		
06/08/2006	Book Fees	2006 Spring Qtr	29.95		
06/08/2006	Credit Card - Self Service	2006 Spring Qtr		347.39	
06/08/2006	GST Tax	2006 Spring Qtr	7.60		
06/08/2006	GST Tax	2006 Spring Qtr	7.00		
06/08/2006	Gym Fees	2006 Spring Qtr	152.00		
06/08/2006	Gym Fees	2006 Spring Qtr	140.00		
06/08/2006	PST Tax	2006 Spring Qtr	3.04		
06/08/2006	PST Tax	2006 Spring Qtr	2.80		

Account Inquiry - Account Activity page

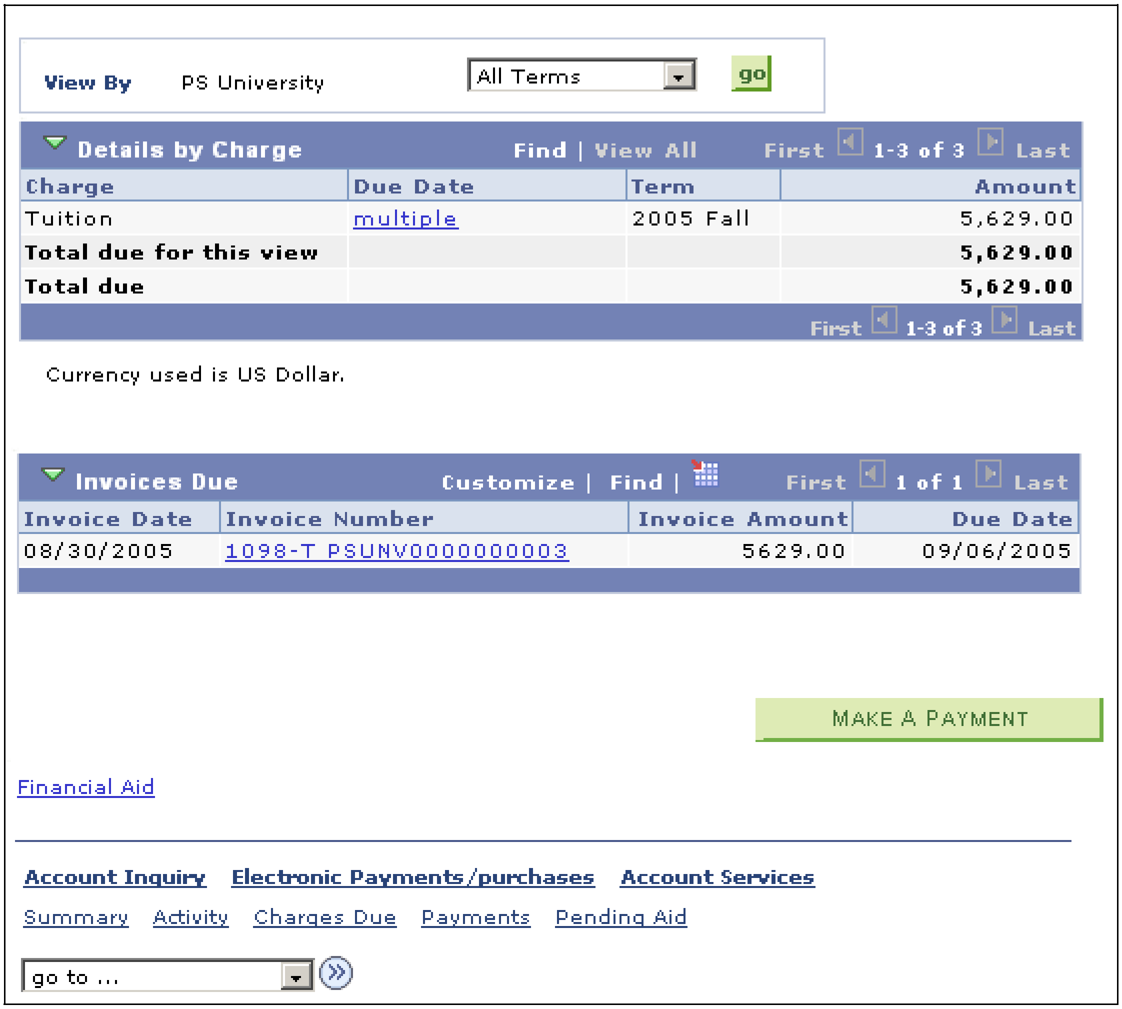
Students can filter account activity by campus and term for specific dates or a range of dates. Additionally, students can use Find to search for specific transactions.

Viewing Charges Due Details

Access the Account Inquiry - Charges Due page (Self Service, Campus Financials, Account Inquiry, Account Inquiry - Charges Due).



Account Inquiry - Charges Due page (1 of 2)



Account Inquiry - Charges Due page (2 of 2)

This page shows three different views of the student's outstanding charges due: a summary of charges by due date, details by due date, and details by type of charge. Click the Details by Due Date region or the Details by Charge region to see the details.

Details by Due Date Expand this region to view charge details by due date.

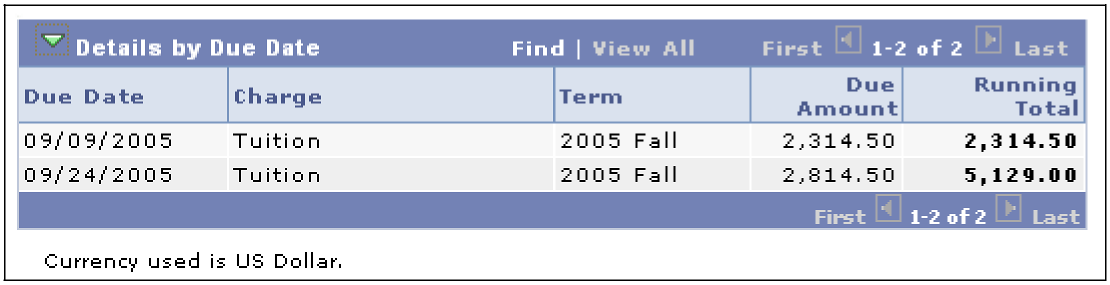
Details by Charge Expand this region to view charge details. Students can filter these by term.

Invoices Due Expand the Invoice Due region to view invoice details.

Viewing Details by Due Date

Access the Details by Due Date page.

Note. The system displays charges by date within a term.



Details by Due Date | Find | View All | First 1-2 of 2 Last

Due Date	Charge	Term	Due Amount	Running Total
09/09/2005	Tuition	2005 Fall	2,314.50	**2,314.50**
09/24/2005	Tuition	2005 Fall	2,814.50	**5,129.00**

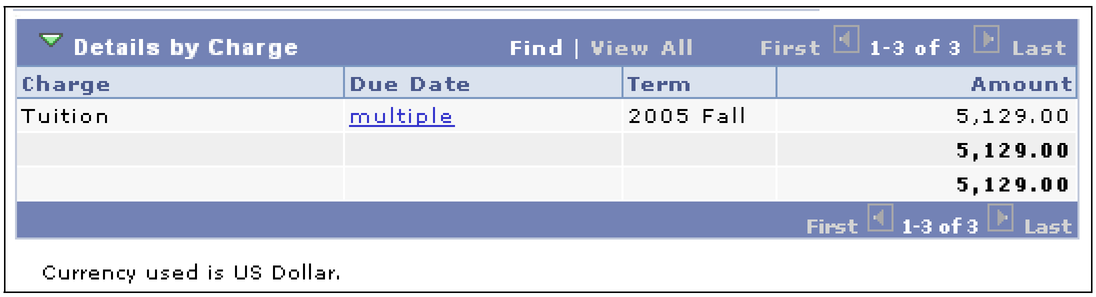
First 1-2 of 2 Last

Currency used is US Dollar.

Details by Due Date page

Viewing Details by Charge

Access the Details by Charge page.



Details by Charge | Find | View All | First 1-3 of 3 Last

Charge	Due Date	Term	Amount
Tuition	multiple	2005 Fall	5,129.00
			5,129.00
			5,129.00

First 1-3 of 3 Last

Currency used is US Dollar.

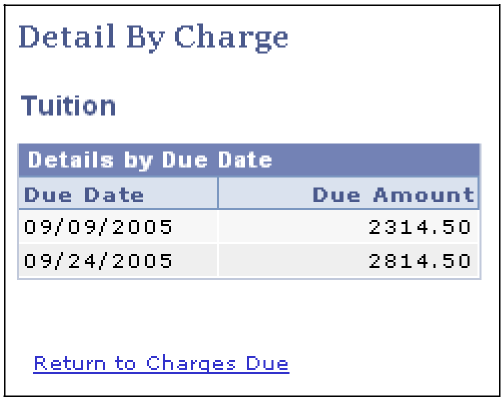
Details by Charge page

The system displays charges based on the selection in the View By field.

View By	Filter the charges due by campus and by term.
multiple	If a charge has multiple due dates, click this link to check those dates.

Viewing Charges Due Details by Due Date

Access the Detail By Charge page.



Detail By Charge

Tuition

Details by Due Date	
Due Date	Due Amount
09/09/2005	2314.50
09/24/2005	2814.50

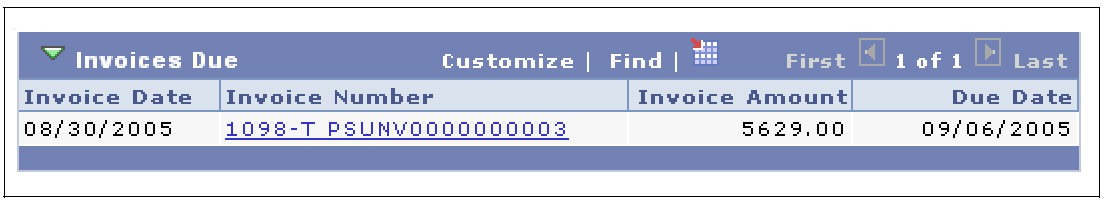
Return to Charges Due

Detail By Charge page

Click Return to Charges Due to return to the previous page.

Viewing Invoices Due Detail

Access the Invoices Due page.



Invoices Due Customize | Find | First 1 of 1 Last

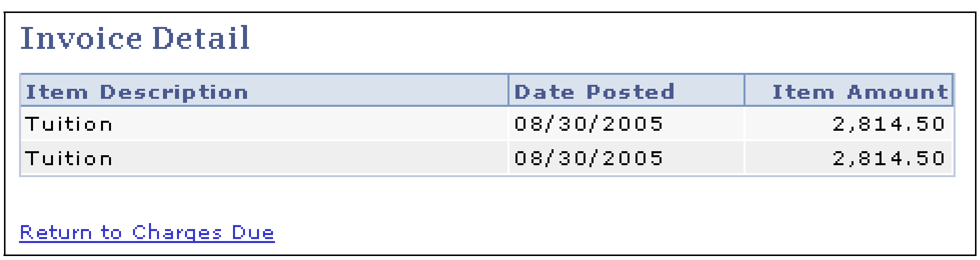
Invoice Date	Invoice Number	Invoice Amount	Due Date
08/30/2005	1098-T PSUNV0000000003	5629.00	09/06/2005

Invoices Due page

This page displays information about invoices that are due.

Viewing Invoice Detail

Access the Invoice Detail page.



Invoice Detail

Item Description	Date Posted	Item Amount
Tuition	08/30/2005	2,814.50
Tuition	08/30/2005	2,814.50

Return to Charges Due

Invoice Detail page

Viewing Payment History

Access the Account Inquiry - Payment History page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Payments).

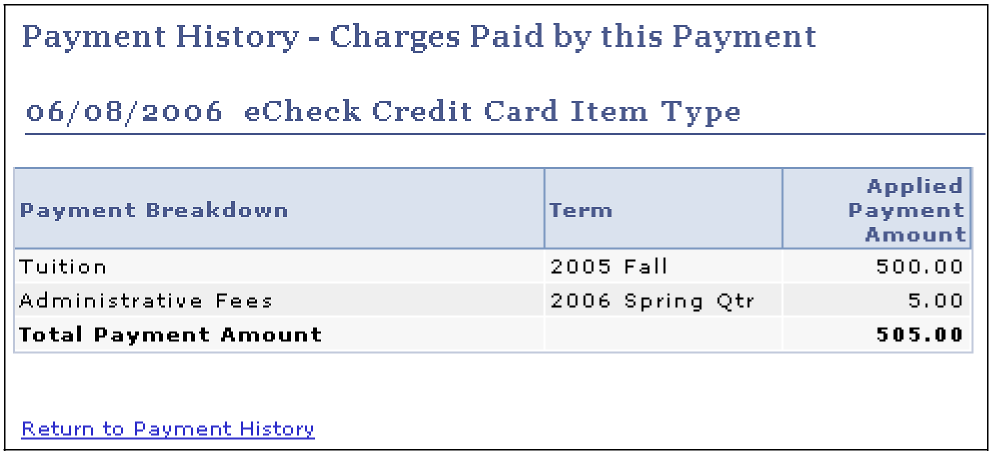
Account Inquiry - Payment History page

Students can filter all posted and pending payment activity by date.

Paid Amount Click to view the specific charges paid by this payment.

Viewing the Charges Paid by a Payment

Access the Payment History - Charges Paid by this Payment page.


Payment History - Charges Paid by this Payment

06/08/2006 eCheck Credit Card Item Type

Payment Breakdown	Term	Applied Payment Amount
Tuition	2005 Fall	500.00
Administrative Fees	2006 Spring Qtr	5.00
Total Payment Amount		**505.00**

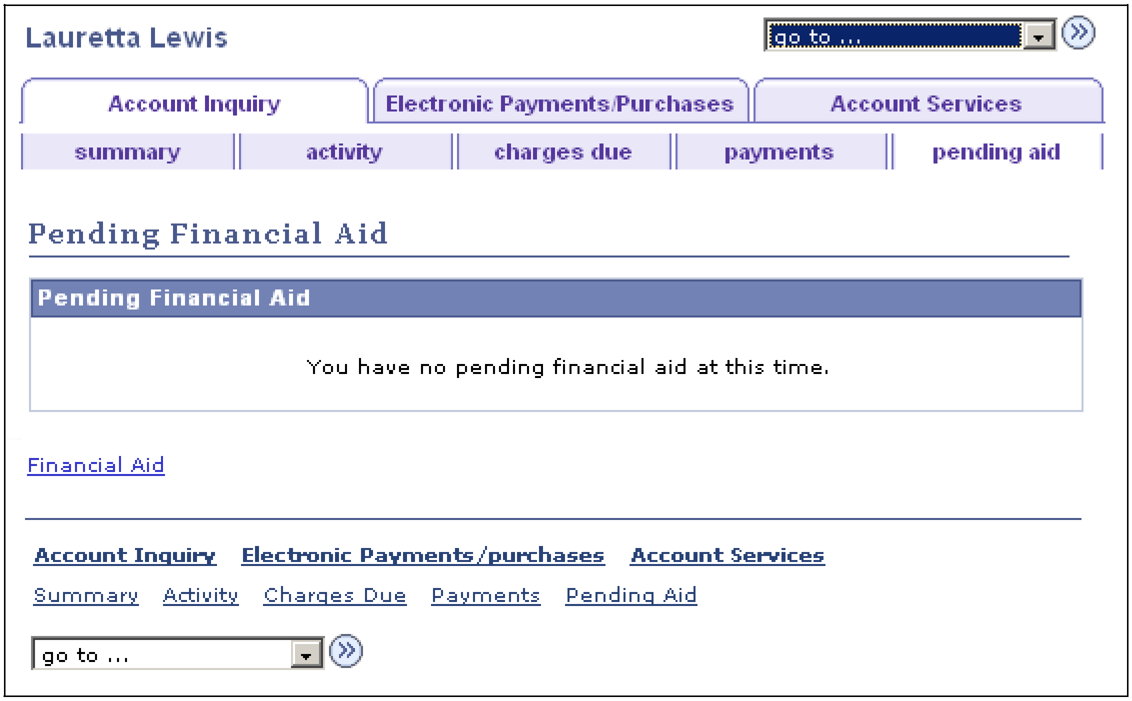
Return to Payment History

Payment History - Charges Paid by this Payment page

Click the Return to Payment History link to return to the previous page.

Viewing Pending Financial Aid

Access the Account Inquiry - Pending Financial Aid page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Pending Financial Aid).



Account Inquiry - Pending Financial Aid page

View pending financial aid amounts by all terms or by specific terms.

Financial Aid Click to access financial aid information.

See Chapter 18, "Using Financial Aid Self Service," page 215.

Creating Payment Profiles

This section provides an overview of self-service payment profiles and discusses how to:

- Add and delete payment profiles.
- View and edit payment profile details.

Understanding Self-Service Payment Profiles

Student Financials enables students to create payment profiles for their various eCheck (checking, savings, or both) or credit card (Visa, MasterCard, American Express, and so on) accounts. By establishing payment profiles, students enter their eCheck and credit card information only once in the Payment Profile component (SS_SF_ACCT_PROFILE). Then, when they make self-service payments, students select the desired payment profile instead of entering their account information. In addition, if a student designates a payment profile as preferred, the system selects that payment profile by default when the student makes a self-service payment.

Note. Payment Profile functionality is not available if you use a hosted payment solution to process your ePayment transactions. Student Financials supports Payment Profiles for customers using non-hosted payment including both Integration Broker and Business Interlink solutions.

Refer to the following section *Understanding Payment Profile Setup* for the steps required to make Payment Profile unavailable.

Understanding Payment Profile Setup

Use the Self Service Payment Profile check box on the SF Installation 2 page to determine whether to allow students to create, save, and use payment profiles. When the check box is selected, existing self-service payment profiles are retained and students can create and save new profiles.

Note. Clearing the check box does not automatically prevent students from creating and maintaining profiles—you must also run the SSF_PPROFDEL process and remove the Payment Profile component from all permission lists–as documented in the setup chapter.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Installation Parameters and Keywords.

If you clear the Self Service Payment Profile check box on the SF Installation 2 page, run the SSF_PPROFDEL process, and remove the Payment Profile component from all permission lists:

- The Payment Profile component is not available in Self Service.
- The payment profile tab and payment profile details are not available on any pages in the Make a Payment component or the Purchase Miscellaneous Items component.

  Payment profile buttons do not appear on the Make a Payment - Specify Payment Details page or the Purchase Items - Specify Payment Details page. Students cannot save a payment profile or use an existing profile during the payment transaction.

  Payment profile details do not appear in the Confirmation Details section on the Make a Payment – Payment Result page.

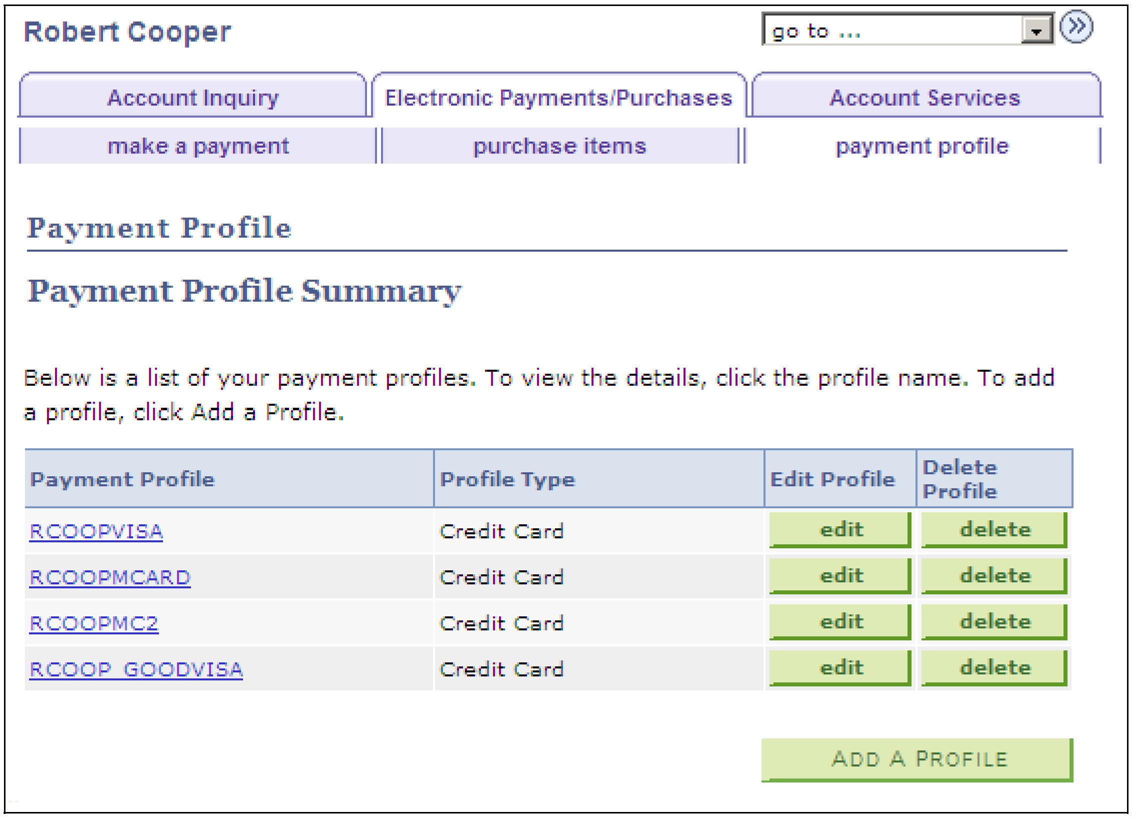
Pages Used to Create Self-Service Payment Profiles

Page Name	*Definition Name*	*Navigation*	*Usage*
Electronic Payments/Purchases - Payment Profile - Payment Profile Summary	SS_SF_ACCT_PROFILE	Self Service, Campus Finances, Electronic Payments/Purchases - Payment Profile - Payment Profile Summary	View payment profiles. If students have established profiles, they appear here.
Electronic Payments/Purchases - Payment Profile - Profile Detail	SS_SF_ACCT_PRFL_D	Self Service, Campus Finances, Payment Profile, Electronic Payments/Purchases - Payment Profile - Profile Detail. Click the link of the appropriate profile.	View payment profiles.

Page Name	*Definition Name*	*Navigation*	*Usage*
Electronic Payments/Purchases - Payment Profile - Edit Payment Profile	SS_SF_ACCT_PRFL_D	Click the Edit or Delete button next to the appropriate profile to edit or delete the details of the payment profile.	Edit or delete details for payment profiles.

Adding and Deleting Payment Profiles

Access the Electronic Payments/Purchases - Payment Profile - Payment Profile Summary page (Self Service, Campus Finances, Payment Profile, Electronic Payments/Purchases - Payment Profile - Payment Profile Summary).



Electronic Payments/Purchases - Payment Profile - Payment Profile Summary page

If a student has not yet created a payment profile, the table is empty. Click the Add A Profile button to create a payment profile.

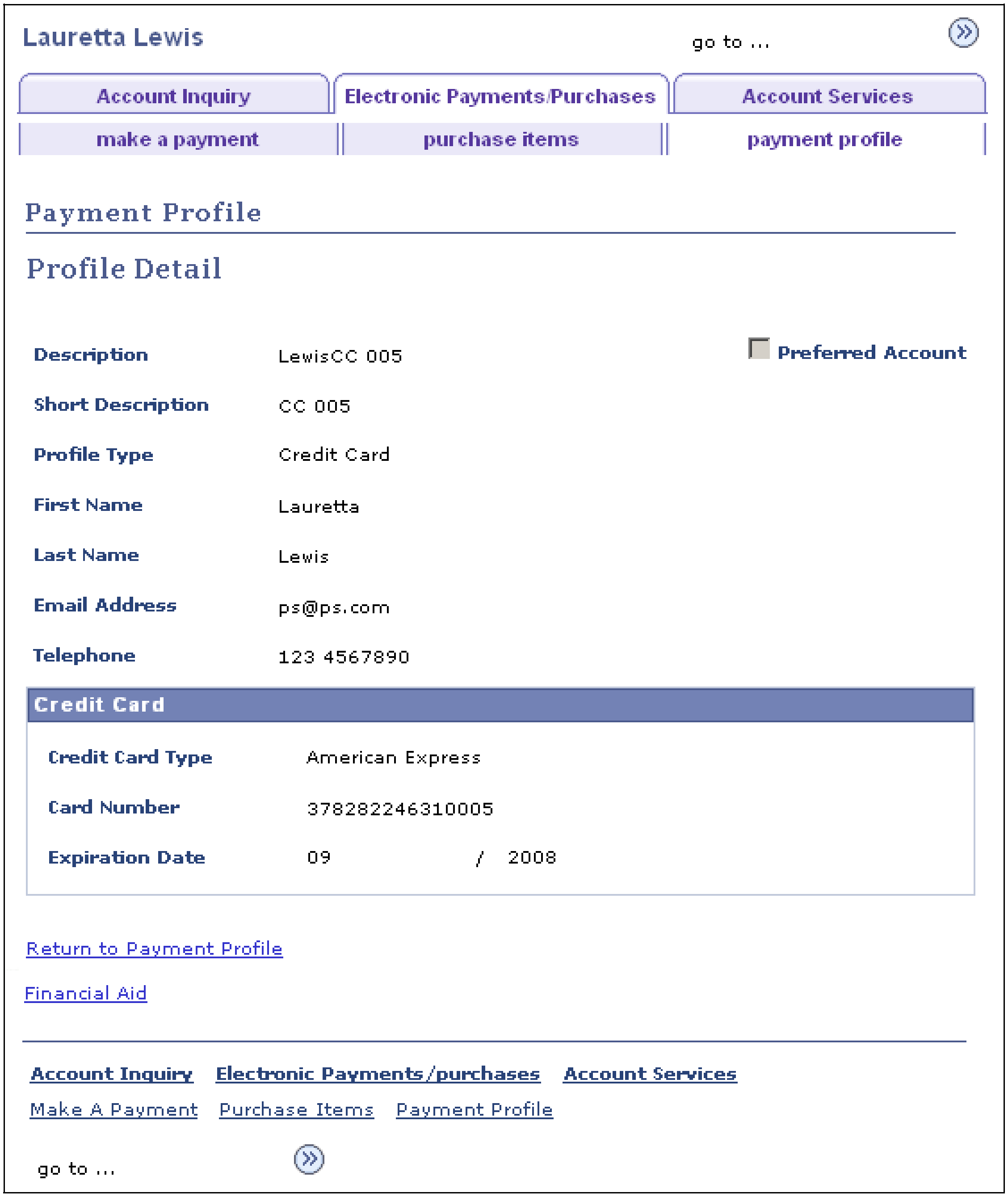
Payment Profile Click a link under this heading to access a view-only version of the Payment Profile - Payment Profile Summary page.

Profile Type Indicates whether the profile is for an *Electronic Check* or *Credit Card* account.

Edit Profile	Click to access an editable version of the Payment Profile - Payment Profile Summary page.
Delete Profile	Click next to the payment profile that you want to delete.
Add a Profile	Click to add a new payment profile.

Viewing and Editing Payment Profile Details

Access the Electronic Payments/Purchases - Payment Profile - Profile Detail page (Self Service, Campus Finances, Payment Profile, Payment Profile - Profile Detail and click the link of the appropriate profile).



Electronic Payments/Purchases - Payment Profile - Profile Detail page

Preferred Account	Select to designate this payment profile (Edit mode only) as the one that the system selects by default whenever the student makes a self-service payment. A student can have only one preferred payment profile per profile (or payment) type.
Profile Type	Specify whether the profile is for an *Electronic Check* or *Credit Card* account. If you select *Electronic Check,* the eCheck group box becomes available. If you select *Credit Card,* the Credit Card group box becomes available.

eCheck

Specify whether the account that you are defining is a checking or savings account and enter the appropriate routing and account numbers.

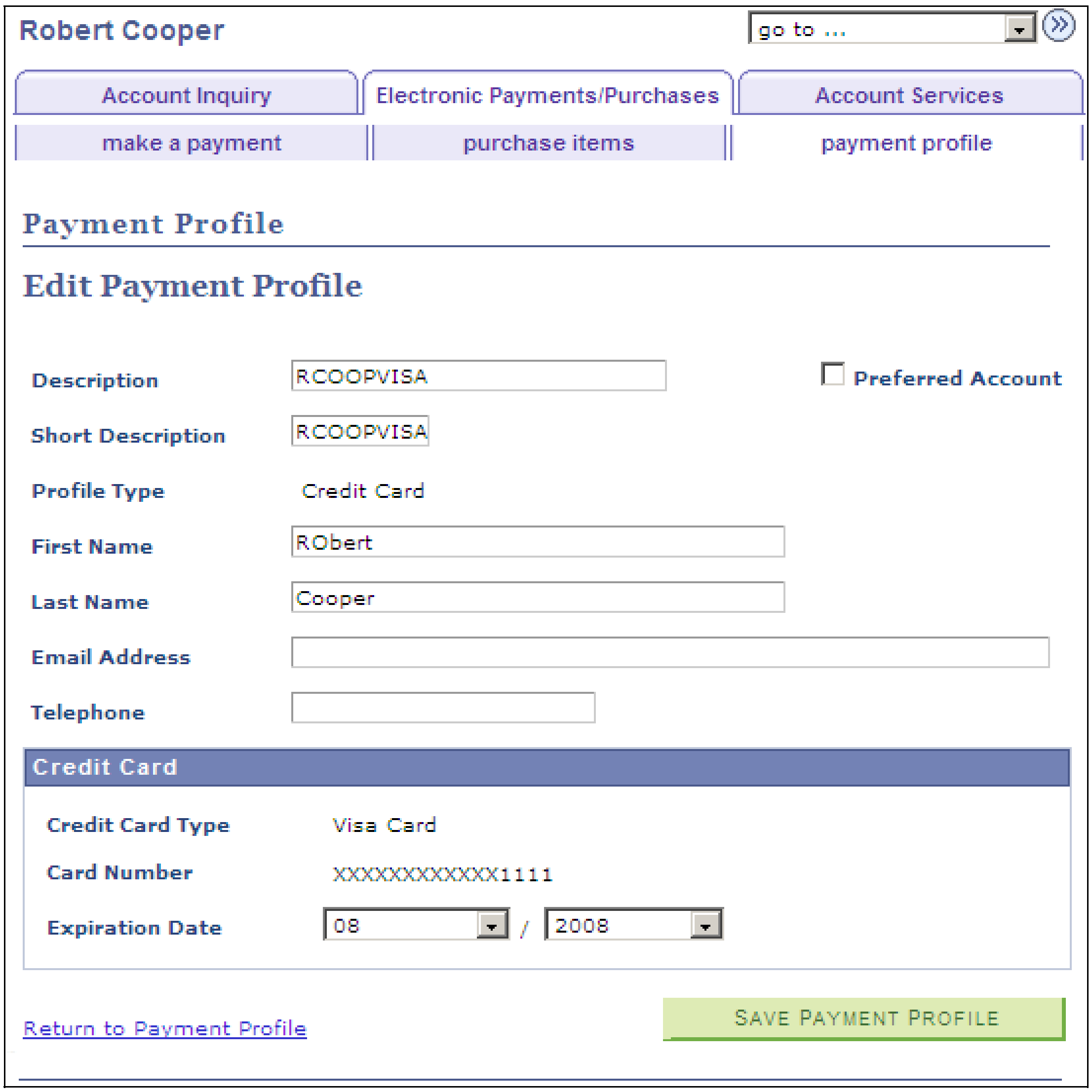
Credit Card

Select the credit card type and enter the credit card number and expiration date.

Editing or Deleting Payment Profile Details

Access the Electronic Payments/Purchases - Payment Profile - Edit Payment Profile page (click the Edit or Delete button next to the appropriate profile to edit or delete the details of the payment profile).

The credit card type and credit card number are read-only, and the card number is masked.



Electronic Payments/Purchases - Payment Profile - Edit Payment Profile page

Making Self-Service Payments

This section provides an overview of self-service payments, lists prerequisites, and discusses how to:

- Specify payment amounts.
- Select payment methods.
- Redirect to hosted payment site.
- Specify payment details (hosted payment).
- Specify payment details (non-hosted payment).
- Confirm payments (hosted and non-hosted payments).
- View successful payment results (hosted and non-hosted payments).
- View declined payment results (hosted and non-hosted payments).

Understanding Self-Service Payments

The self-service feature of PeopleSoft Student Financials enables students to access their account information and make payments over the internet. The self-service pages can be accessed from the Student Center, the Account Inquiry page, or the menu navigation.

Self-Service Account Review

Students often want to view their account information more than once a month when they receive their statements from the institution. Using self service, students can view up-to-date information about their accounts at any time.

Total Due Charges Review

When students want to know how much money they owe to the institution, they may not want to review all of their account activity for each term. The Campus Finances self-service component provides a direct way for students to see their due charges.

Self-Service Payments

The Make a Payment self-service component (SSF_SS_PAYMENT) enables students to make electronic payments toward their account, using credit card or eCheck depending on the form of payment that your institution accepts. Additionally, if you set up your institution to allow it, students can allocate their self-service payments to specific charges.

The Make a Payment pages appear and function differently depending on whether you use the hosted payment feature.

If you use the hosted payment feature for self-service ePayment transactions, the step numbers that represent the number of pages or steps required to complete the transaction do not appear on the Make a Payment pages because part of the transaction is performed on the external hosted payment provider site. The numbers appear on the pages if you do not use hosted payment.

Note. If your setup allows for the charges that are payable by credit card to be different from the charges that are payable by electronic check, the Select Payment Method page appears before the Specify Payment Amount page. If the charge priority is the same for credit card and electronic check, the Specify Payment Amount page appears first because it does not change regardless of the payment method that the student selects. The order of appearance of the pages is the same whether you use hosted or non-hosted payment.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Installation Parameters and Keywords.

Note. Whether payment profile functionality is available in the Make a Payment component depends on your self-service setup and also on whether you use hosted payment.

See Chapter 17, "Using Student Financials Self Service," Understanding Self-Service Payment Profiles, page 171.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Installation Parameters and Keywords.

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

Messaging

The PeopleSoft application delivers a set of messages that accompany many of the self-service pages. These messages are intended to help students through the self-service experience. These messages are user-defined in the Message Catalog, and they can be modified by an administrator. They appear at the top of most pages. For instance, if a student is paying with an eCheck, then the student receives the following message about his or her Personal Identification Number (PIN) as a potential requirement for user authentication: *You will need your PIN in order to submit an eCheck Transaction.* Messages can be changed only by an administrator.

Prerequisites

Before students can access their accounts over the internet, you must set up your PeopleSoft Student Financials system to allow them to do so by setting up a Payment Merchant, SF Merchant, and Institution Set. The choices that you make when setting up an institution set determine what your students can see and do when accessing their accounts. Different fields and pages are available to your students depending on how you set up the institution set.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing," Setting Up Payment Merchants.

See Chapter 6, "Setting Up Student Financials Self Service," Setting Up Institution Sets, page 38 and *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing," Setting Up SF Merchants.

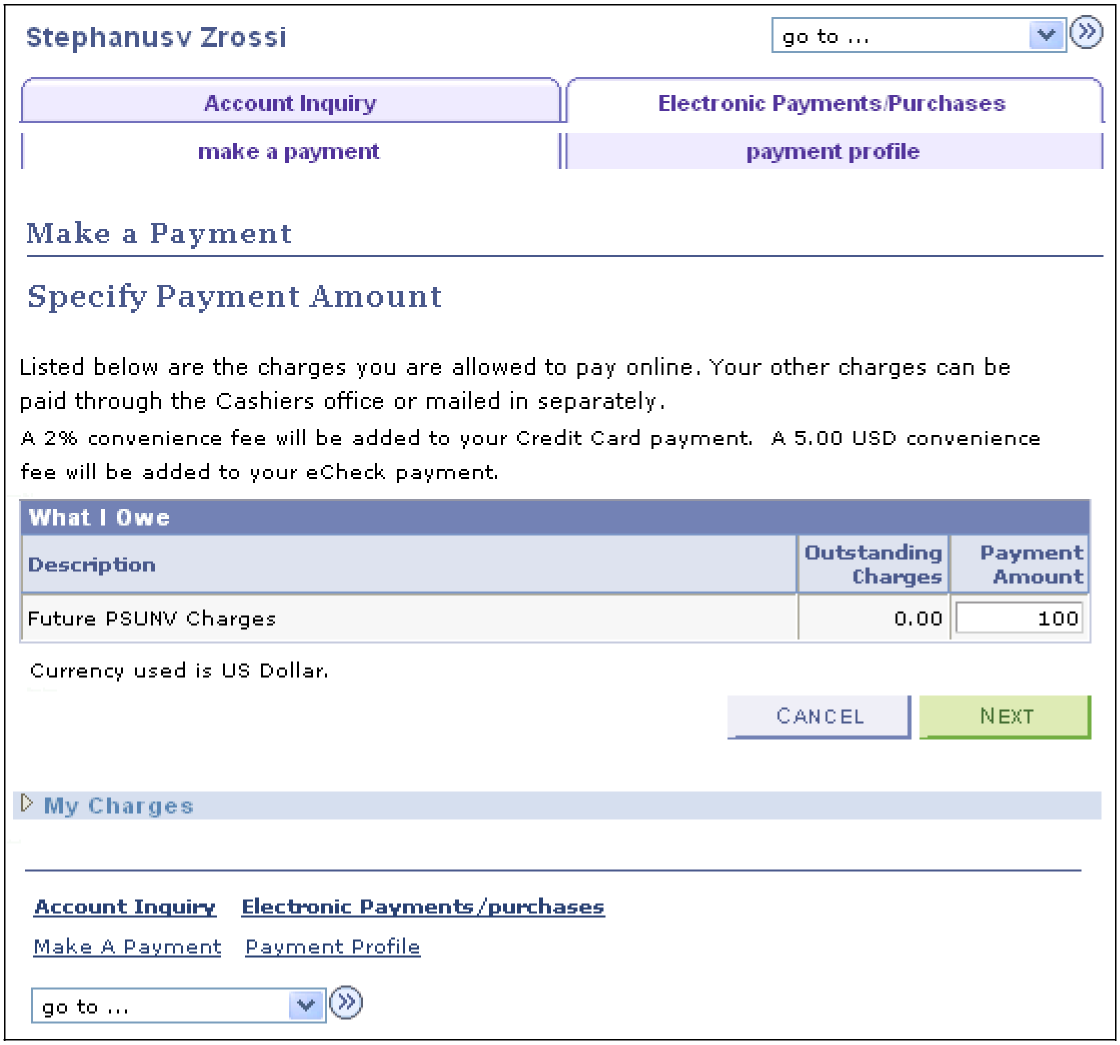
Pages Used to Make Self-Service Payments

Page Name	***Definition Name***	***Navigation***	***Usage***
Electronic Payments/Purchases - Make a Payment - Specify Payment Amount	SSF_SS_PMT_ALLOC	Self Service, Campus Finances, Make a Payment, Electronic Payments/Purchases - Make a Payment	Specify the amount to pay toward outstanding charges.
Electronic Payments/Purchases - Make a Payment - Select Payment Method	SSF_SS_PMT_METHOD	Click the Next button on the Make a Payment - Specify Payment Amount.	Depending on whether the institution supports both the eCheck and credit card payment methods, select the method by which to make a payment.
Electronic Payments/Purchases - Make a Payment - Confirm Payment	SSF_SS_PMT_MSG	For hosted payment only: Click the Next button on the Make a Payment - Select Payment Method page.	Advise students that their payments will be collected through a third party provider. When a student clicks the Continue to Make Payment button, the student is transferred to the third party site to input credit card or eCheck details.
Electronic Payments/Purchases - Make a Payment - Specify Payment Details	SSF_SS_PMT_CR_CARD	For non-hosted payment only: Click the Next button on the Make a Payment - Select Payment Method page.	Specify either the credit card or eCheck payment details for the current transaction.
What is a Security Code	SSF_CVV_ABOUT	Click the What is a Security Code? link on the Make a Payment - Specify Payment Details page.	Access information about the Security Code that is located on credit cards.
Electronic Payments/Purchases - Make a Payment - Confirm Payment	SSF_SS_PMT_SUBMIT	For non-hosted payment, click the Next button on the Make a Payment - Specify Payment Details page. For hosted payment, click Continue from the third party site.	Confirm payment details. This page appears differently for hosted and non-hosted payments.
Electronic Payments/Purchases - Make a Payment - Payment Result	SSF_SS_PMT_RESULT	Click the Submit button on the Make a Payment - Confirm Payment page.	View successful and declined payment results.

Specifying Payment Amounts

The transaction flow that is discussed here assumes that charge priorities for credit card and echeck are the same—therefore, the Make a Payment - Specify Payment Amount page appears first.

Access the Make a Payment - Specify Payment Amount page.



Make a Payment - Specify Payment Amount page

This page is the same for hosted and non-hosted payment modes, except that a message about a PIN being required for echeck transactions appears for non-hosted payment.

What I Owe Table

The columns that appear in the What I Owe table are based on the allocation level that you specified on the Institution Set page.

Payment Amount Enter different amounts for each of the charges that appear.

pay all charges	Click to pay all charges listed.
zero out amounts	Click to zero out amounts in the Payment Amount fields.
calculate total	Click to calculate the amounts in the Payment Amount fields.

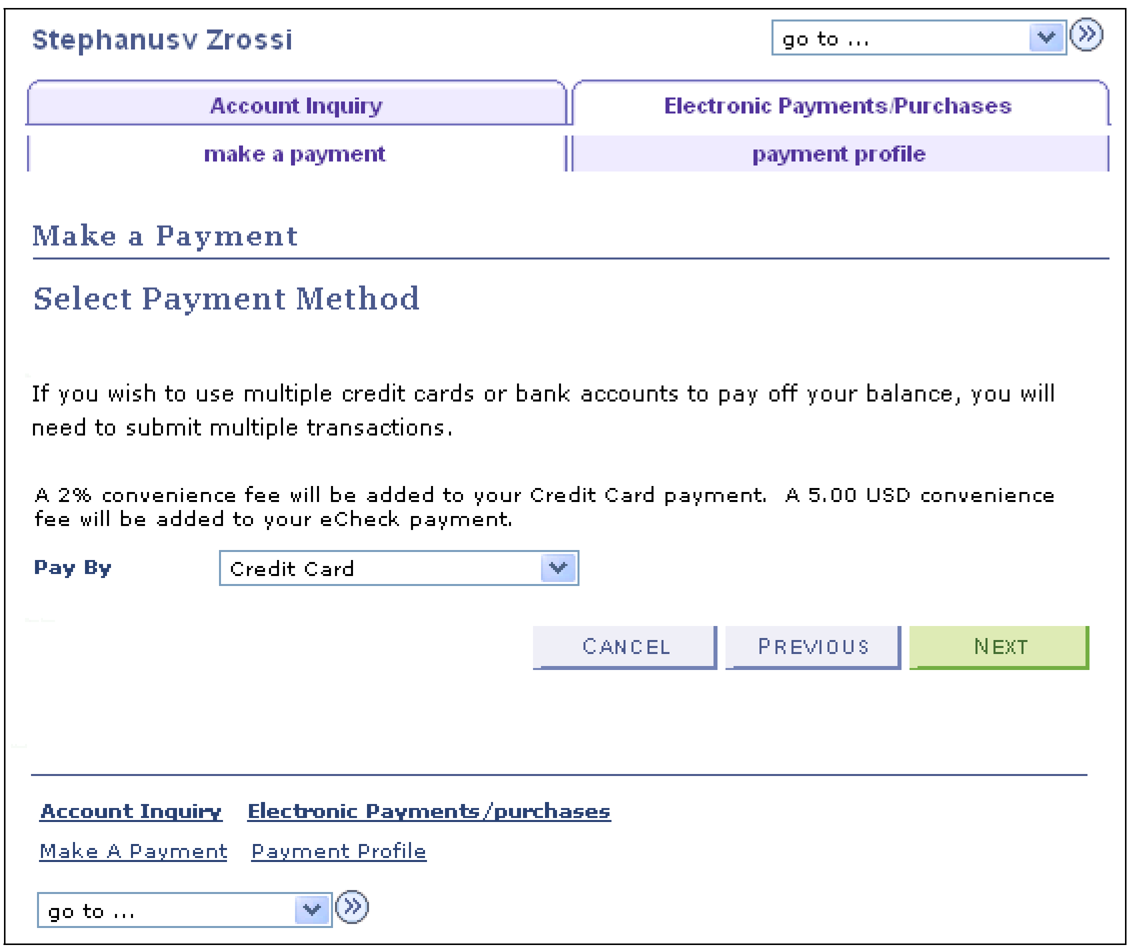
Charges Due Table

The Charges Due table is based on what your institution defined in the setup. If the allocation level that you specified on the Institution Set page is *By Business Unit,* the charge details will be grouped by business unit. If the allocation level that you specified on the Institution Set page is *By Term,* the charge details will be grouped by term within the business unit.

Multiple	If a charge has multiple due dates, click this link to check those dates.

Selecting Payment Methods

Access the Make a Payment - Select Payment Method page.



Make a Payment - Select Payment Method page

This appearance of this page is the same for hosted and non-hosted payment modes.

This page enables students to choose whether to pay by credit card or by eCheck. This page appears for students only if you enter a value in both the SF Credit Card Merchant ID and SF eCheck Merchant ID fields for the associated institution set. If you allow only one type of payment, this page does not appear and the only payment method available appears by default.

Note. The selection that a student makes determines which charges are eligible for payment according to the charge priority list that the institution defined for the item type associated with the selected payment method. For example, if a student selects *Electronic Check,* the Payment Details page and the Payment Amount page display only the charges on the student's account that are eligible for payment by the eCheck item type defined.

See Also

Chapter 6, "Setting Up Student Financials Self Service," Defining Basic Institution Set Parameters, page 39

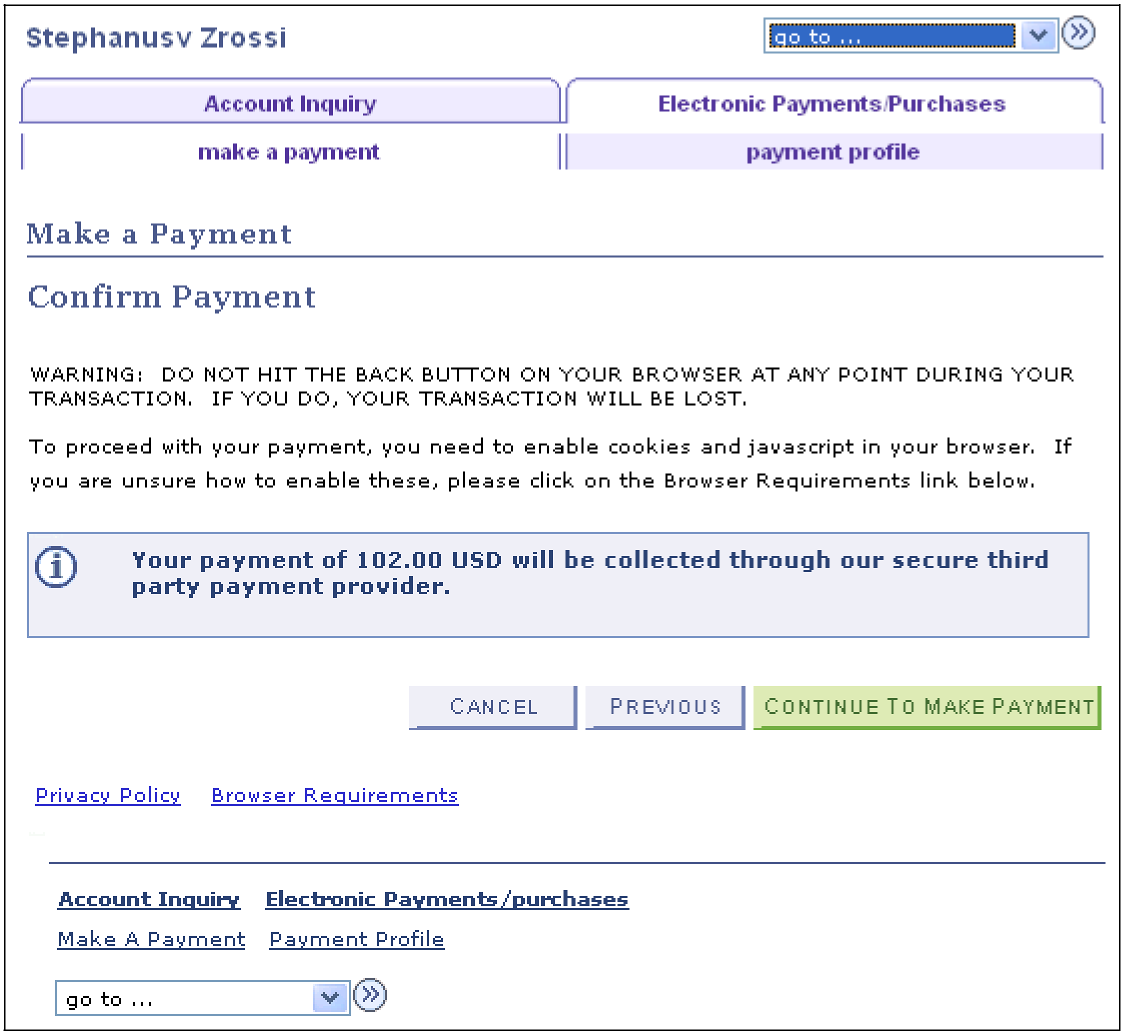
PeopleSoft Enterprise Student Financials 9.0 PeopleBook, "Completing Student Financials General Setup," Defining Miscellaneous Parameters for Item Types

Redirecting to Hosted Payment Site

This section applies only if you use hosted payment mode.

If you use hosted payment, after a student selects a payment method and clicks NEXT on the Make a Payment - Select Payment Method page, the Make a Payment - Confirm Payment page appears.

Access the Make a Payment - Confirm Payment page.



Make a Payment - Confirm Payment page

The browser message, Browser Requirements link, and Privacy Policy link appear based on the setup on the Electronic Payments and Payment Merchant pages.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing," Defining Electronic Payment Merchants.

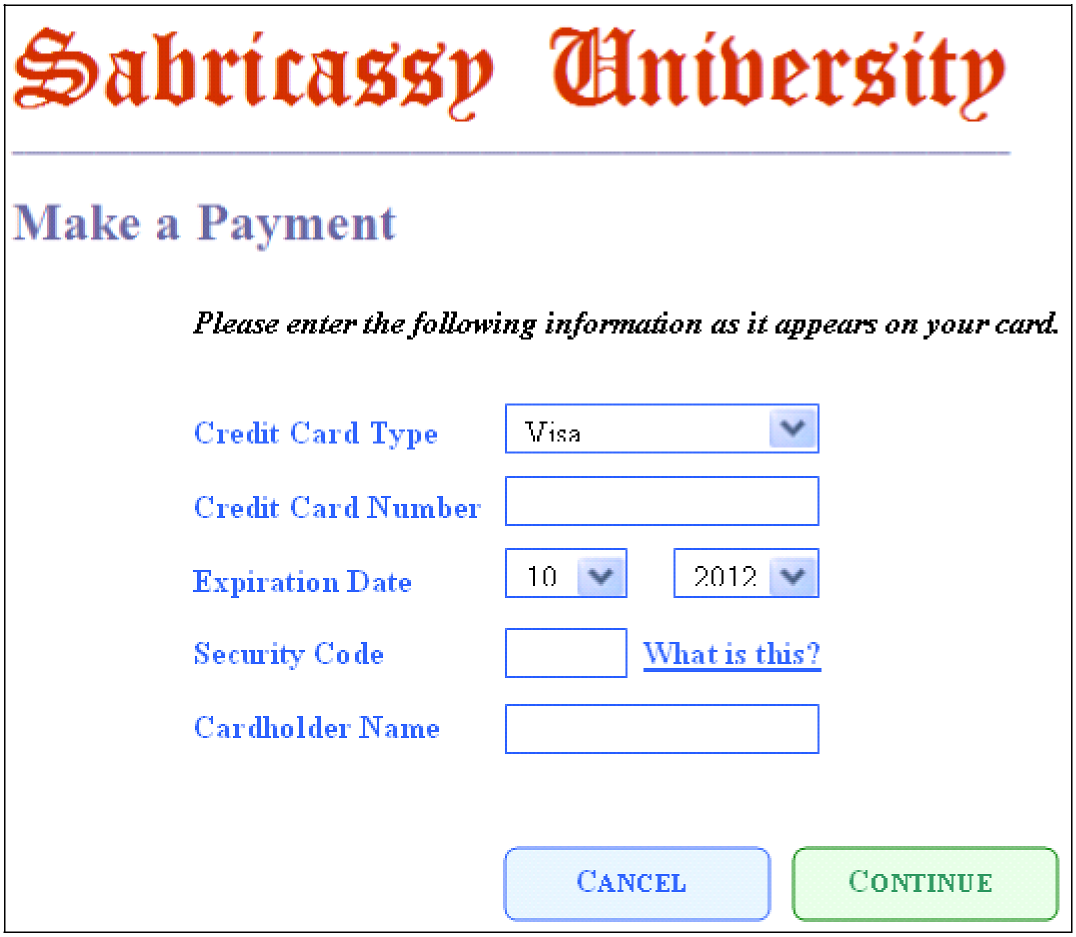
See Chapter 6, "Setting Up Student Financials Self Service," Defining Self-Service ePayments for Institution Sets, page 45.

Specifying Payment Details (Hosted Payment)

This section applies to hosted payment only.

When the student clicks the Continue to Make Payment button, information about the payment is sent to the third party Payment provider, and the student is transferred to the third party site to input the credit card or eCheck details.

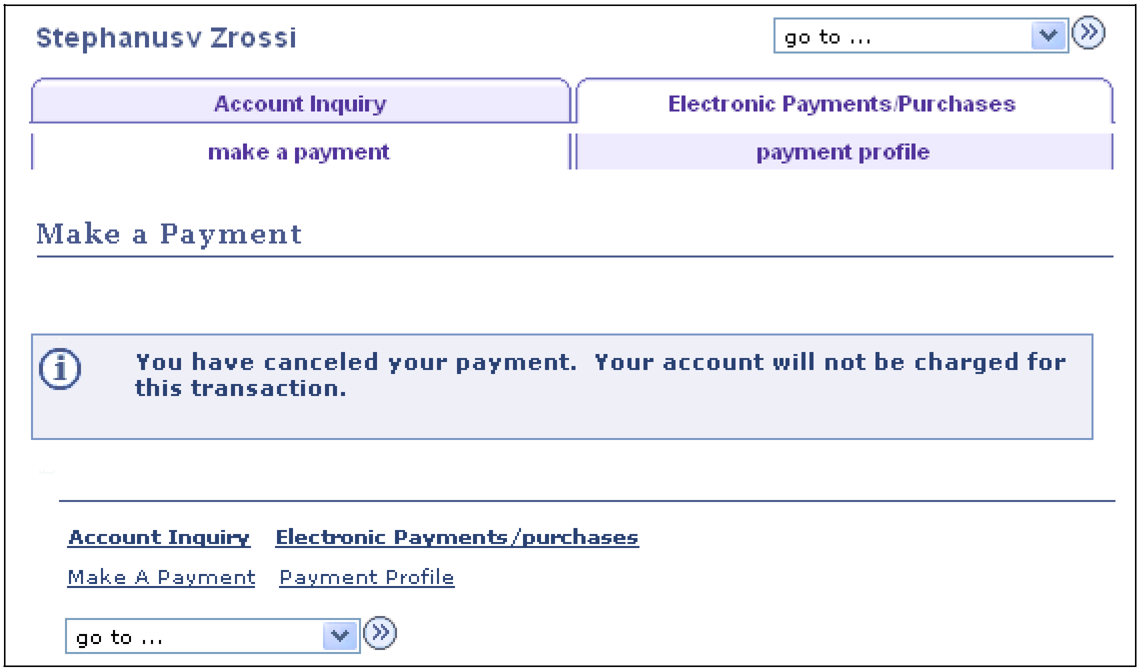
Here is an example page:



Sample third party page

The student enters payment details on the third party hosted site. The student clicks Continue to return to Campus Solutions. Authorization does not occur here. Buttons and images on the page might be configurable at the third party site.

If the student clicks Cancel from the third party hosted site, the student is taken to a page in self-service Make a Payment which displays a message advising that the payment is canceled:



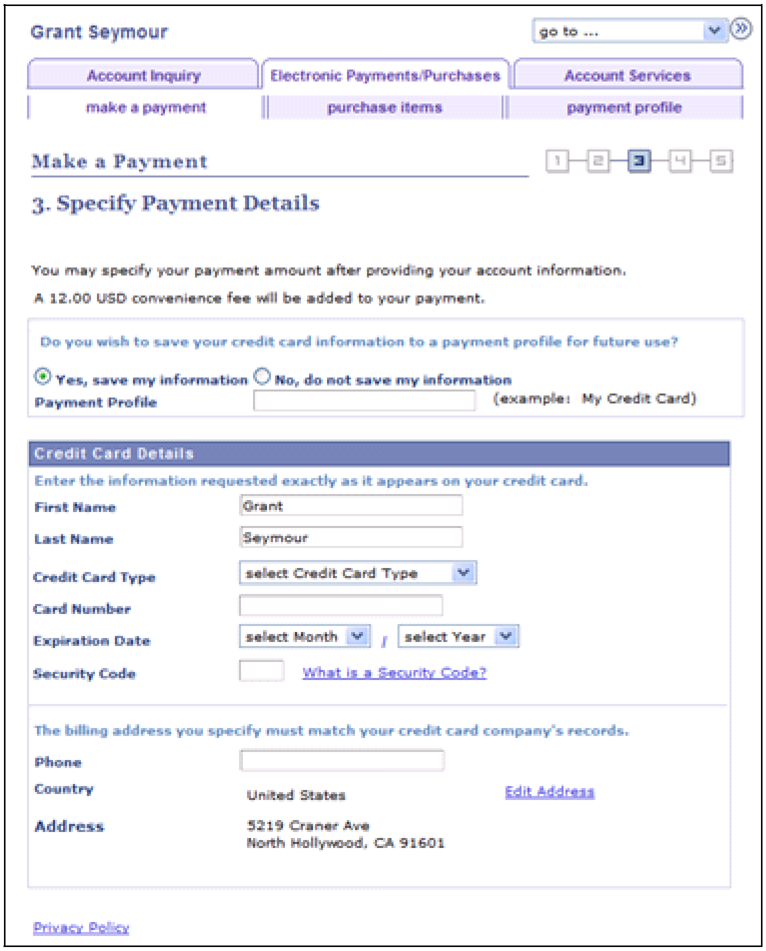
Make a Payment page: Canceled payment

The payment status is updated to Canceled. Similarly, if an error occurs, the student is taken to the Payment Result page and the payment status is updated to Error.

Specifying Payment Details (Non-Hosted Payment)

This section applies to non-hosted payment only.

Access the Make a Payment - Specify Payment Details page.



Make a Payment - Specify Payment Details page

If a student has not created a payment profile before accessing this page, the student must create one from this page to be able to enter or confirm ePayment information.

Payment Profile options are only available if the Self Service Payment Profile check box is selected on the SF Installation 2 page (Set Up SACR, Install, Student Fin Installation, SF Installation 2).

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Defining Keyword Edit Tables and a Null Due Date.

Create New Profile, Use Existing Profile, Do not use Profile, and**Save Payment Profile**

Select one of these options, depending on whether a payment profile was already created.

If the Use Existing Profile option is selected, the student cannot update the credit card type, credit card number, account type or account number. Account specific date can only be entered if the student selects one of the following options, Create New Profile or Do not use Profile.

You can also use this attribute to update an existing Payment Profile as part of successfully transmitting an ePayment transaction.

Payment Profile

If a student has created a payment profile, select it from the Payment Profile drop-down list box.

Depending on whether the student chose credit card or electronic check, the following fields will differ.

Credit Card Details

First Name and **Last Name**	Enter the first and last name on the bank account.
Credit Card Type	Select the type of credit card to use. The type of credit card is masked. **Note.** The type of credit card is masked.
Credit Card Number	Enter the credit card number. **Note.** The credit card number is masked.
Expiration Year and Date	Enter the expiration year and date for the credit card.
Security Code	Enter the Security Code that is located on the credit card. It is a security feature for "card not present" transactions such as Internet transactions. The Security Code field is available if the Security Code Required check box is selected on the SF Merchants page. See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing," Setting Up SF Merchants.
What is a Security Code?	Click this link to access the What is a Security Code page.
Telephone	Enter the telephone number.
Country and **Address**	Based on the Address Usage option and the student's address table, the system retrieves the appropriate address.
Edit Address	Click to change the address for the current ePayment transaction.

eCheck Account Details

First Name and **Last Name**	Enter the first and last name on the bank account.
Bank Account Type	Select the type of bank account to use.
Routing Number	Enter the routing number for the bank account.
Account Number	Enter the account number for the bank account. The eCheck account number is masked.

Telephone	Enter the telephone number.
Country and **Address**	Based on the Address Usage option and the student's address table, the system retrieves the appropriate address.
Edit Address	Click to change the address for the current ePayment transaction.

Privacy Policy

Privacy Policy	This link is available if the Display Privacy Policy check box is selected on the Electronic Payments page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Electronic Payments).

Confirming Payments (Hosted and Non-Hosted Payments)

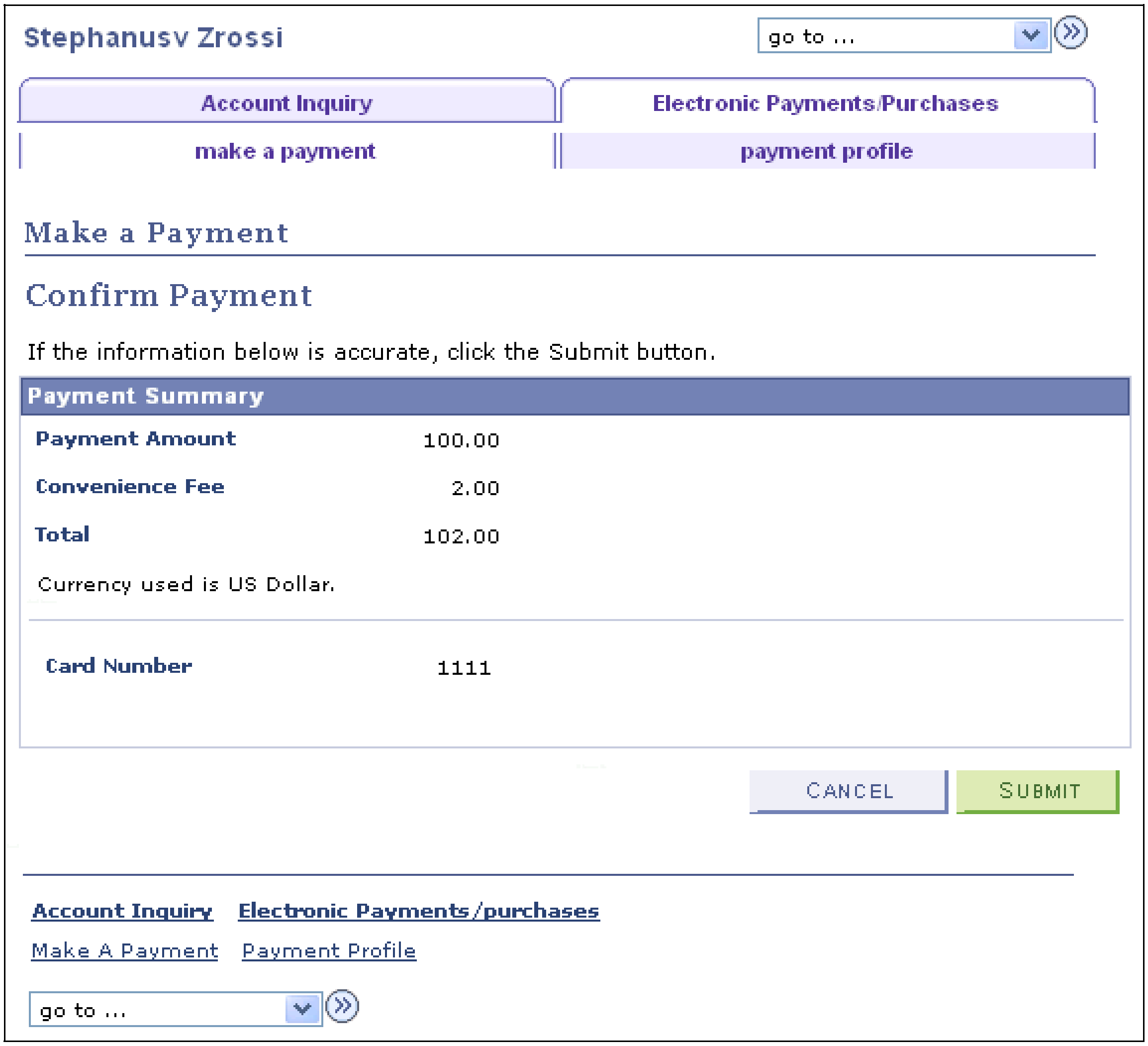
The Make a Payment - Confirm Payment page confirms the payments that students want to submit. The information that appears in the Payment Summary region reflects whether students made payments by credit card or eCheck.

Information that is not collected, such as address and email, does not appear on this page.

The page appears differently for hosted and non-hosted payment modes.

Hosted Payment Mode

Access the Make a Payment - Confirm Payment page.



Make a Payment - Confirm Payment page (hosted payment)

In hosted payment mode, the change payment amount and change payment details buttons are not available. Only the CANCEL and SUBMIT buttons are available to the student. The student cannot make changes to the amount or payment details (credit card or bank account information) because of the external third party provider relationship.

Depending on the third party provider, only the last 4 digits of the credit card number or bank number might be retrieved from the third party payment provider and displayed to the student prior to the authorization. Whether this information appears on the Confirm Payment page depends on whether the third party provider sends the information to Student Financials.

Where possible, after the payment is authorized, the credit card type and bank account type are stored by Student Financials in the database, as it is a valuable reconciliation tool.

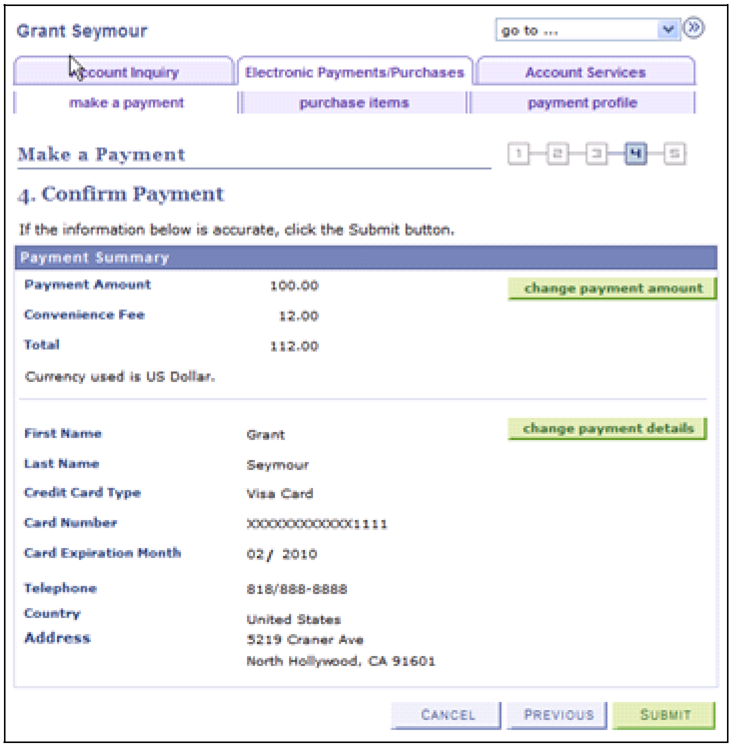
If a student clicks the CANCEL button, the payment is already saved as Initiated even if the student clicks YES to confirm the cancellation action.

Non-Hosted Payment Mode

In non-hosted payment mode, more information, such as student details, appear on the page, and a student can change payment amount or details using the change payment amount and change payment details buttons.

If a student clicks the CANCEL button, and then clicks Yes to confirm the cancellation action, the payment is not saved.

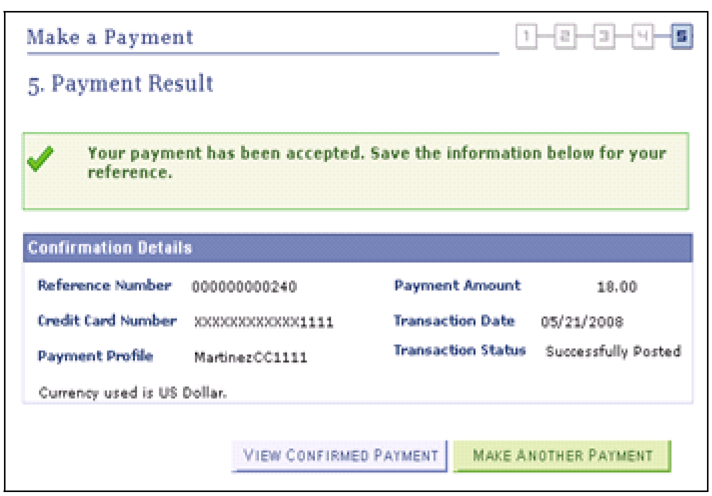
Here is an example of the page in non-hosted mode:



Make a Payment - Confirm Payment page (non-hosted payment)

Viewing Successful Payment Results (Hosted and Non-Hosted Payments)

Access the Make a Payment - Payment Result page.



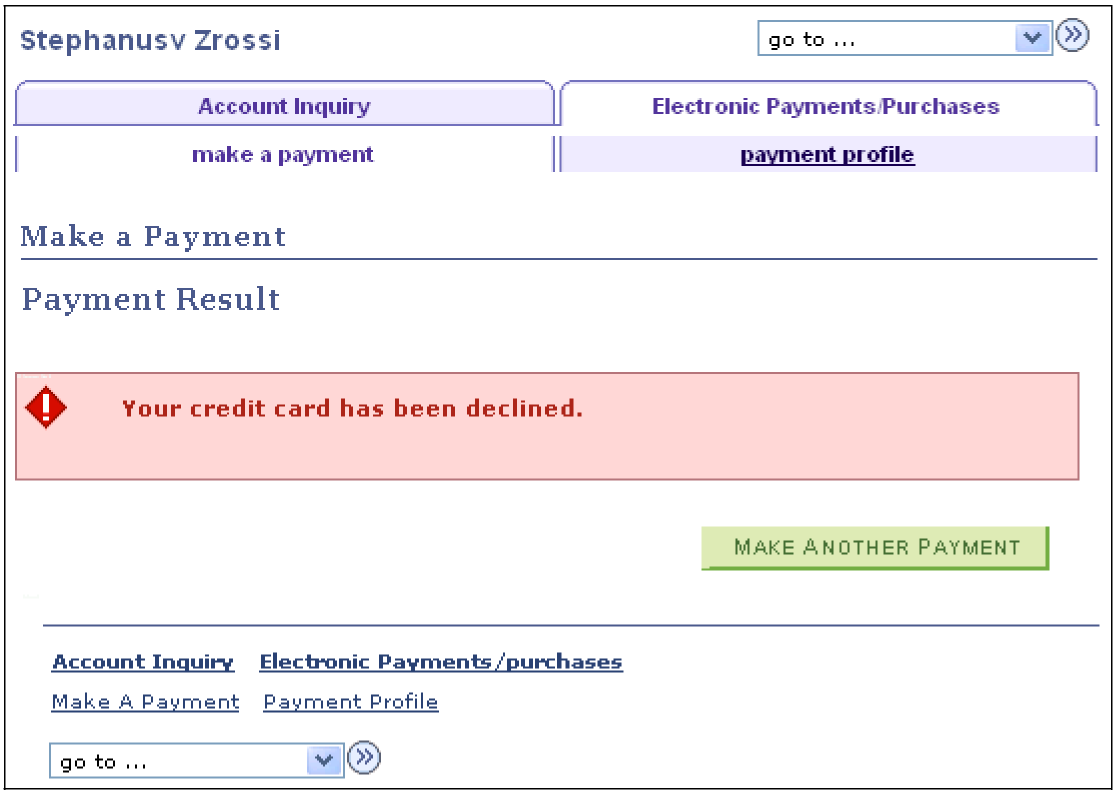
Make a Payment - Payment Result

The page appears the same in hosted payment and non-hosted payment modes, except that in hosted mode, a payment profile is not created and displayed on the page.

View Confirmed Payment	Click to go to the Payments tab to verify the recently submitted transaction. This button is available only following a successfully submitted transaction.
Make Another Payment	Click to start the Make a Payment process from the beginning.

Viewing Declined Payment Results (Hosted and Non-Hosted Payments)

Access the Make a Payment - Payment Result page.



Make a Payment - Payment Result page (payment declined)

In hosted payment mode, the RESUBMIT PAYMENT button is not available. The student can only make a new payment.

Resubmit Payment	This button is available only in non-hosted payment mode. Click to review and edit the retained payment data. To start over, click Make Another Payment.
Make Another Payment	Click to begin the Make a Payment process from the beginning.

Purchasing Miscellaneous Items

Your institution may provide access to students and others to select and purchase miscellaneous items or services outside of the regular tuition and fees calculated by Tuition Calculation. After selecting and purchasing these items or services, you will be routed to Make a Payment pages, where the transaction will be completed.

This section discusses how to:

- Purchase miscellaneous items.
- Select items.
- Confirm an order.
- Make a payment.

Note. Whether payment profile functionality is available in the Purchase Miscellaneous Items component depends on your self-service setup and on whether you use hosted payment.

See Chapter 17, "Using Student Financials Self Service," Understanding Self-Service Payment Profiles, page 171.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Installation Parameters and Keywords.

Note. Using hosted payment does not impact how you select items for purchase. However, the payment process for purchasing miscellaneous items is different depending on whether you use hosted or non-hosted payment. Refer to the Making Self-Service Payments section earlier in this chapter.

See Chapter 17, "Using Student Financials Self Service," Making Self-Service Payments, page 177.

Pages Used to Purchase Miscellaneous Items

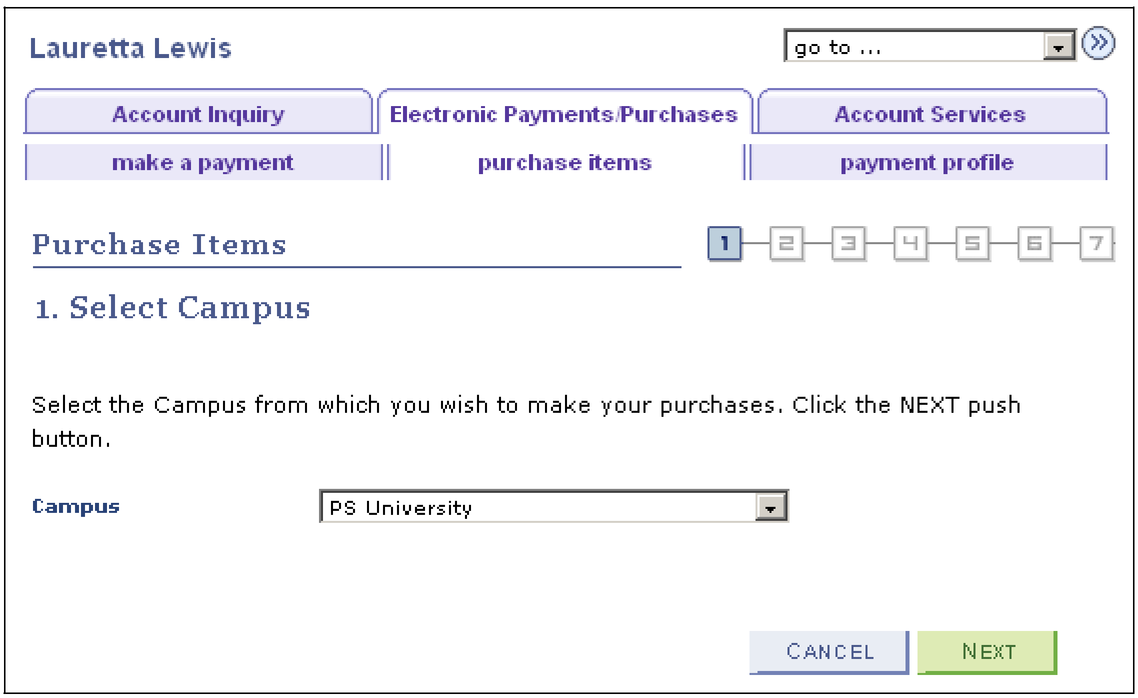
Page Name	*Definition Name*	*Navigation*	*Usage*
Electronic Payments/Purchases - Purchase Items - Select Campus	SSF_SS_BU_SELECT	• Self Service, Campus Finances, Purchase Miscellaneous Items - Select Campus • Access step 1 of the Purchase Items Wizard.	Select the campus from which to make a purchase.

Page Name	***Definition Name***	***Navigation***	***Usage***
Electronic Payments/Purchases - Purchase Items - Select Items	SSF_SS_MISC_PUR	• Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Campus Click the Next button. • Access step 2 of the Purchase Items Wizard.	Enter the quantity of the purchased items.
Electronic Payments/Purchases - Purchase Items - Confirm Order	SSF_SS_PMT_ITMCONF	• Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Items Click the Next button. • Access step 3 of the Purchase Items Wizard.	Verify the amount and total of the items to be purchased.
Electronic Payments/Purchases - Purchase Items- Select Payment Method	SSF_SS_PMT_METHOD	Click the Next button on the Purchase Items - Confirm Order page	Depending on whether the institution supports both the eCheck and credit card payment methods, select the method by which to make a payment.
Electronic Payments/Purchases - Purchase Items - Confirm Payment	SSF_SS_PMT_MSG	For hosted payment only: Click the Next button on the Purchase Items - Select Payment Method page.	Advise students that their payments will be collected through a third party provider. When a student clicks the Continue to Make Payment button, the student is transferred to the third party site to input credit card or eCheck details.
Electronic Payments/Purchases - Purchase Items - Specify Payment Details	SSF_SS_PMT_CR_CARD	For non-hosted payment only: Click the Next button on the Purchase Items - Select Payment Method page.	Specify either the credit card or eCheck payment details for the current transaction.
What is a Security Code	SSF_CVV_ABOUT	Click the What is a Security Code? link on the Purchase Items - Specify Payment Details page.	Access information about the Security Code that is located on credit cards.

Page Name	Definition Name	Navigation	Usage
Electronic Payments/Purchases - Purchase Items- Confirm Payment	SSF_SS_PMT_SUBMIT	For non-hosted payment, click the Next button on the Purchase Items - Specify Payment Details page. For hosted payment, click Continue from the third party site.	Confirm payment details. This page appears differently for hosted and non-hosted payments.
Electronic Payments/Purchases - Purchase Items - Payment Result	SSF_SS_PMT_RESULT	Click the Submit button on the Purchase Items - Confirm Payment page.	View successful and declined payment results.

Purchasing Miscellaneous Items

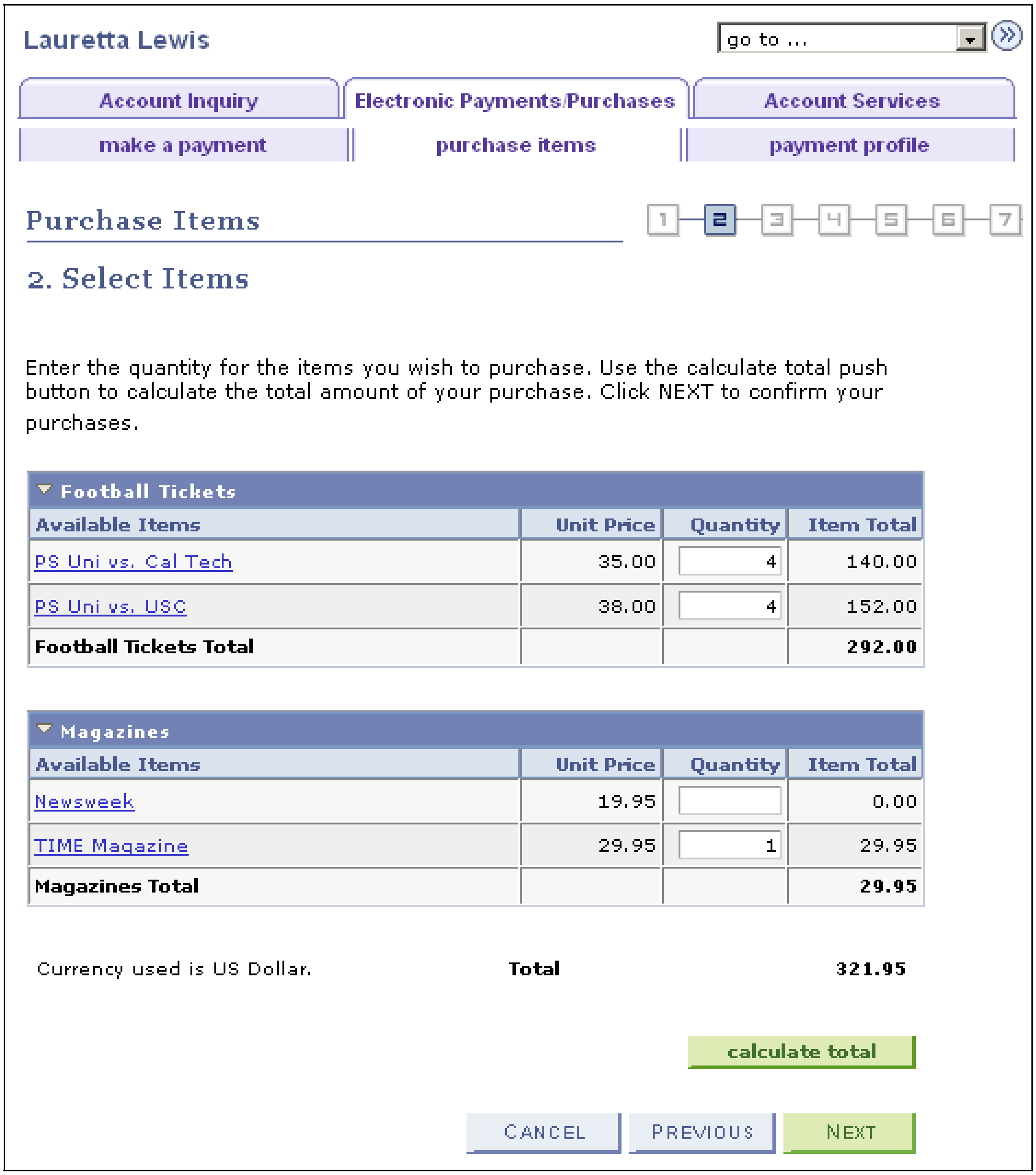
Access the Electronic Payments/Purchases - Purchase Items - Select Campus page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items, Select Campus).



Electronic Payments/Purchases - Purchase Items - Select Campus page

Selecting Items

Access the Electronic Payments/Purchases - Purchase Items - Select Items page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Campus and click the Next button).



Electronic Payments/Purchases - Purchase Items - Select Items page

Students can make multiple transactions at one time. For term-based selections, current and future terms will appear in the grid. Expired terms (based on the term end date) or items that are not within the effective date and expiration date will not be available for selection.

If taxes (sales or GST) are included, a separate line item will appear after the Total line. A subtotal line appears after each grid for multiple entries in each category.

After selections are made, click the Calculate Total button.

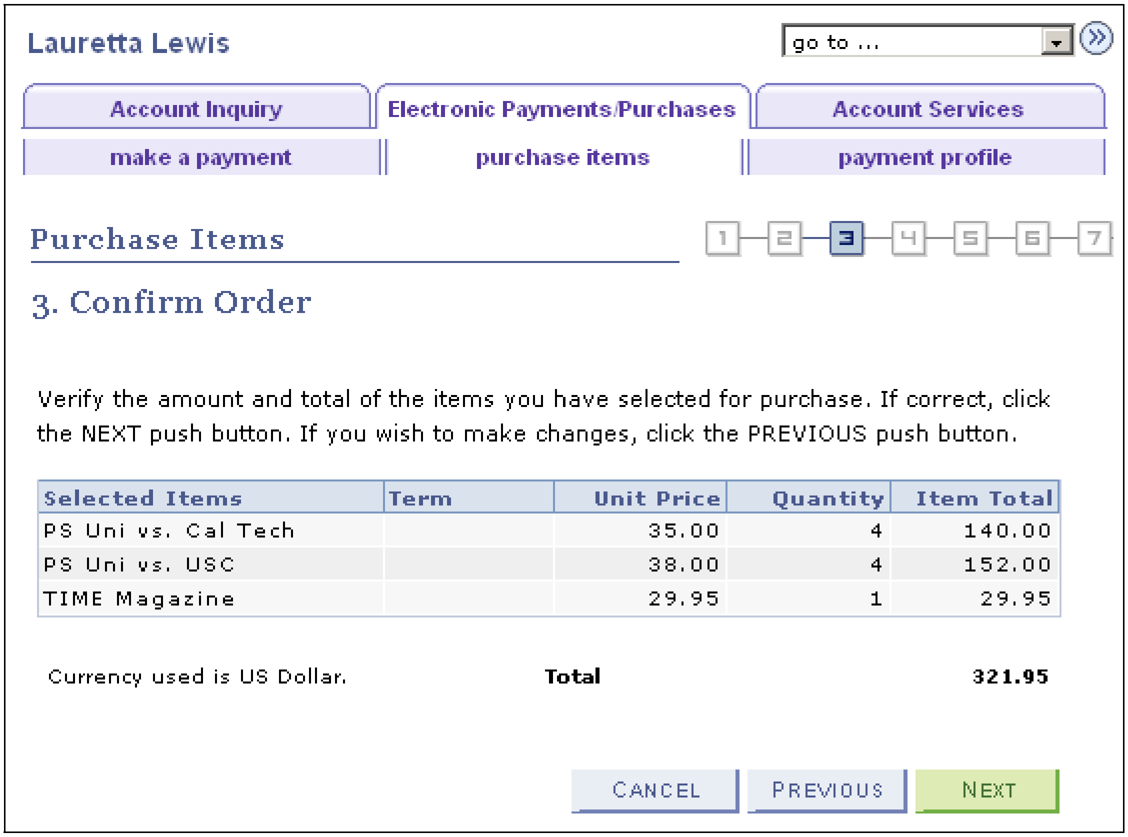
If you click Cancel, the system exits the Miscellaneous Purchases page and accesses the Account Summary page.

Click Next to have the system display a purchase confirmation page.

Click Next again to begin the Make a Payment process.

Confirming an Order

Access the Electronic Payments/Purchases - Purchase Items - Confirm Order page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Items and click the Next button).



Electronic Payments/Purchases - Purchase Items - Confirm Order page

This page provides a consolidated list of selections and a total of all items before beginning the Make a Payment process.

Click Next to proceed through the Make a Payment process.

Making a Payment

For information about making a payment for miscellaneous items, refer to the Making Self-Service Payments section earlier in this chapter.

Using Account Services

This section discusses how to:

- Enroll in a payment plan.
- View the 1098-T form.
- Receive the 1098-T form online.
- Complete the 1098-T consent agreement.
- Receive the 1098-T consent confirmation.
- View student permissions.
- Select the permission form.
- Grant permission using the form agreement.
- Confirm student permission.
- View student permission agreement.

Pages Used for Account Services

Page Name	*Definition Name*	*Navigation*	*Usage*
Account Services - Enroll in Payment Plan - Select Payment Plan	SSF_SS_PPL_SEL	• Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan • Access step 1 of the Payment Plan Wizard.	Select a payment plan.
Account Services - Enroll in Payment Plan - Review Installments	SSF_SS_PPL_CALC	• Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan Click the Next button. • Access step 2 of the Payment Plan Wizard.	Change the installment amount, number of installments, or both.
Account Services - Enroll in Payment Plan - Agreement	SSF_SS_PPL_SUBMIT	• Self Service, Campus Finances, Enroll in Payment Plan - Review Installments Click the Next button. • Access step 3 of the Payment Plan Wizard.	Review the terms of the payment plan before enrolling in the plan.

Page Name	***Definition Name***	***Navigation***	***Usage***
Account Services - Enroll in Payment Plan - Agreement	SSF_SS_PPL_RESULT	• Self Service, Campus Finances, Enroll in Payment Plan - Agreement Click the Next button. • Access step 4 of the Payment Plan Wizard.	Review the terms of the payment plan before enrolling in the plan.
Account Services - 1098T Tax Form	SSF_SS_1098_SEL	• Self Service, Campus Finances, Account Services - View 1098-T • Access step 1 of the View 1098-T Wizard.	Indicate which tax year to view.
1098-T Consent Agreement	SSF_SS_1098_RESULT	• Self Service, Campus Finances, Account Services - View 1098-T, 1098-T Consent Agreement Click the Submit button. • Access step 2 of the View 1098-T Wizard.	Capture 1098-T consent confirmation.
Account Services - Student Permissions	SSF_SS_PERM_VIEW	Self Service, Campus Finances, View Student Permissions	View student permissions.
Student Permissions - Select Permission Form	SSF_SS_PERM_SEL	• Self Service, Campus Finances, View Student Permissions Click the Grant Permissions button. • Access step 1 of Student Permissions selection.	Select the desired permissions form.

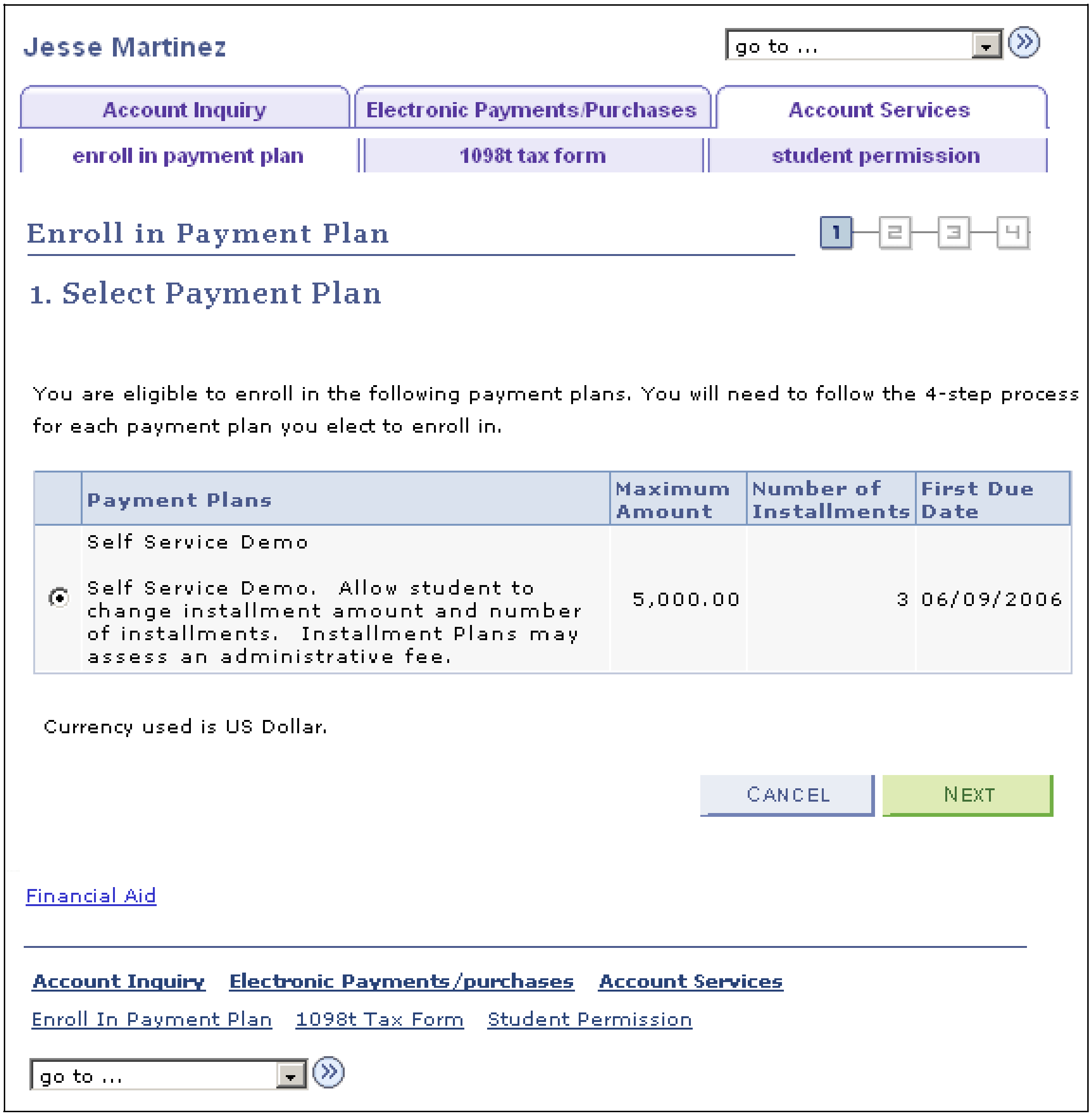
Page Name	Definition Name	Navigation	Usage
Student Permissions - Permission Form Agreement	SSF_SS_PERM_SUBMIT	• Self Service, Campus Finances, View Student Permissions, Student Permissions - Select Permission Form Click the Next button. • Access step 2 of Student Permissions selection.	Read and agree to the selected permissions form.
Student Permissions - Student Permission Confirmation	SSF_SS_PERM_RESULT	• Self Service, Campus Finances, View Student Permissions, Student Permissions - Permission Form Agreement Click the Submit button. • Access step 3 of Student Permissions selection.	Receive student permission confirmation.
Student Permission Agreement	SSF_SS_PERM_VW_SEC	• Self Service, Campus Finances, View Student Permissions Click the Display Student Agreement link. • Access step 4 of Student Permissions selection.	Review the student permission agreement.

Enrolling in a Payment Plan

A student can link their charges to a specified payment plan.

Select Payment Plan

Access the Account Services - Enroll in Payment Plan - Select Payment Plan page (Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan).



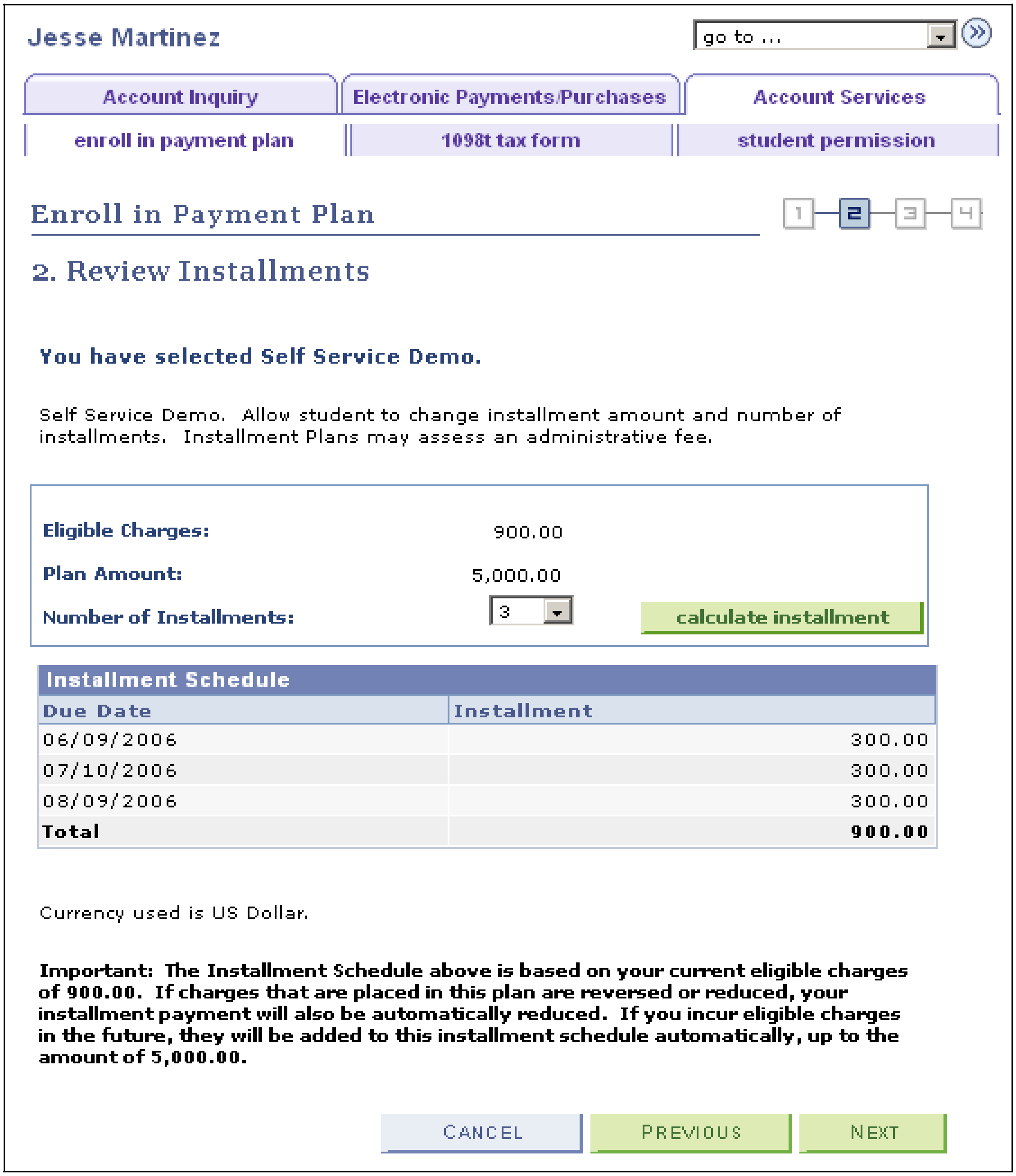
Account Services - Enroll in Payment Plan - Select Payment Plan page

This page enables students to select a payment plan from among all eligible payment plans.

Click a plan. The first line of the Plan Description is derived from the Payment Plan description. The text after the first line is derived from the Payment Plan setup - Self Service description.

Review Installments

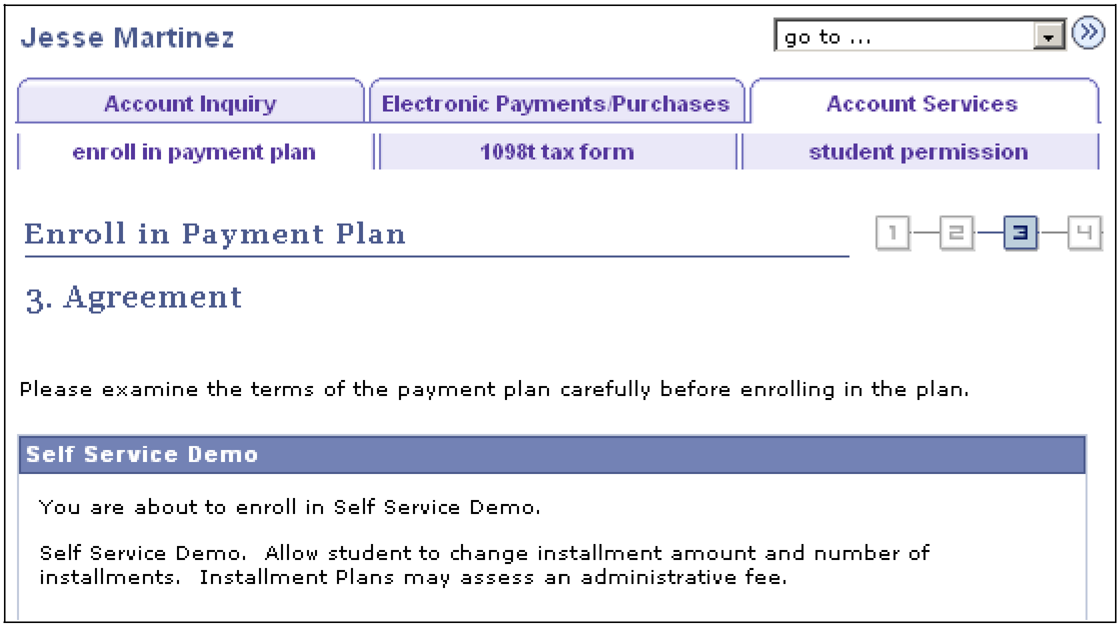
Access the Enroll in Payment Plan - Review Installments page (Self Service, Campus Finances, Enroll in Payment Plan, Select Payment Plan and click the Next button).



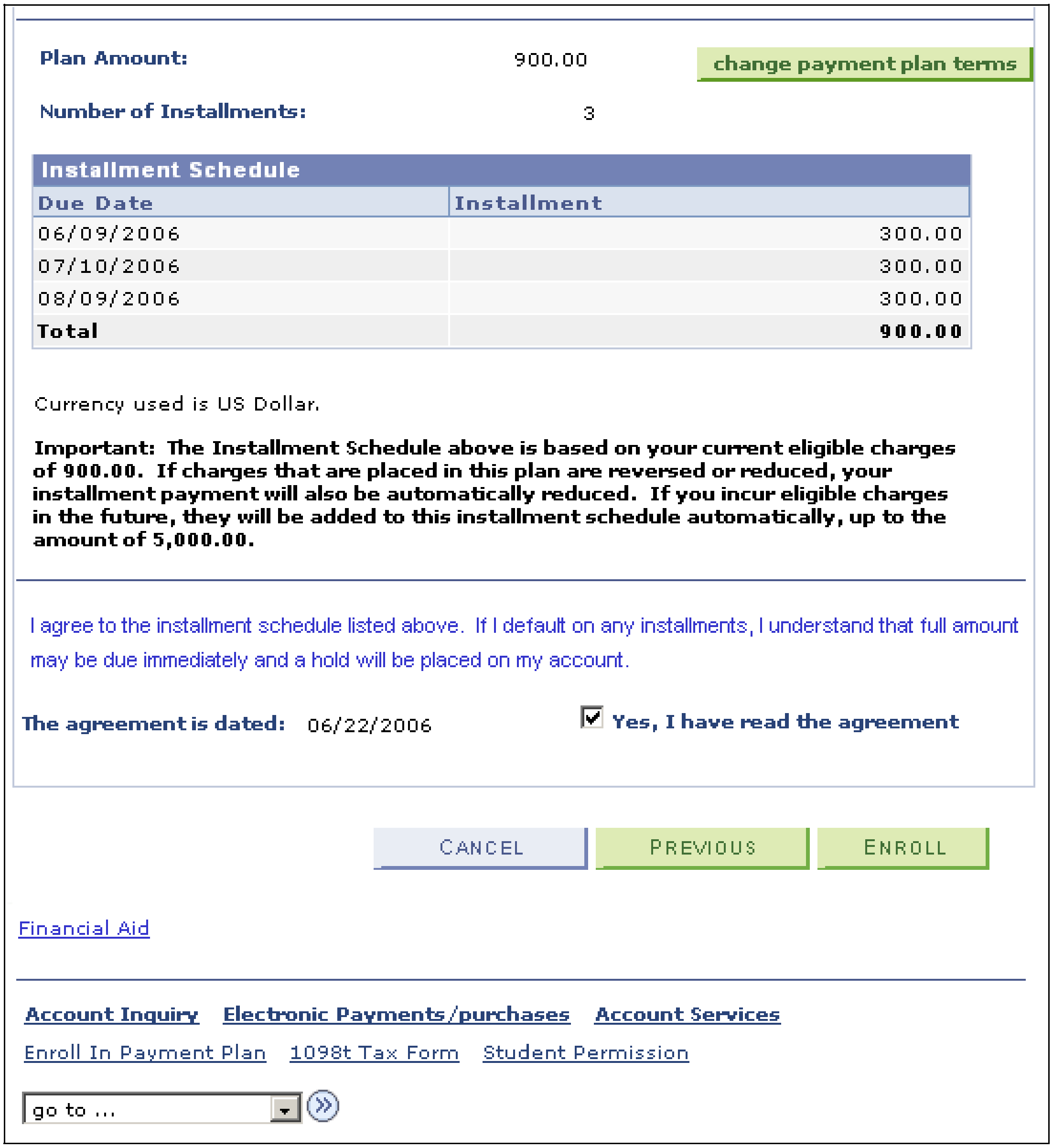
Account Services - Enroll in Payment Plan - Review Installments page

Agreement

Access the Enroll in Payment Plan - Agreement page (Self Service, Campus Finances, Enroll in Payment Plan - Review Installments and click the Next button).



Account Services - Enroll in Payment Plan - Agreement page (1 of 2)



Plan Amount: 900.00 change payment plan terms

Number of Installments: 3

Installment Schedule	
Due Date	**Installment**
06/09/2006	300.00
07/10/2006	300.00
08/09/2006	300.00
Total	**900.00**

Currency used is US Dollar.

Important: The Installment Schedule above is based on your current eligible charges of 900.00. If charges that are placed in this plan are reversed or reduced, your installment payment will also be automatically reduced. If you incur eligible charges in the future, they will be added to this installment schedule automatically, up to the amount of 5,000.00.

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.

The agreement is dated: 06/22/2006 ☑ Yes, I have read the agreement

CANCEL PREVIOUS ENROLL

Financial Aid

Account Inquiry Electronic Payments/purchases Account Services

Enroll In Payment Plan 1098t Tax Form Student Permission

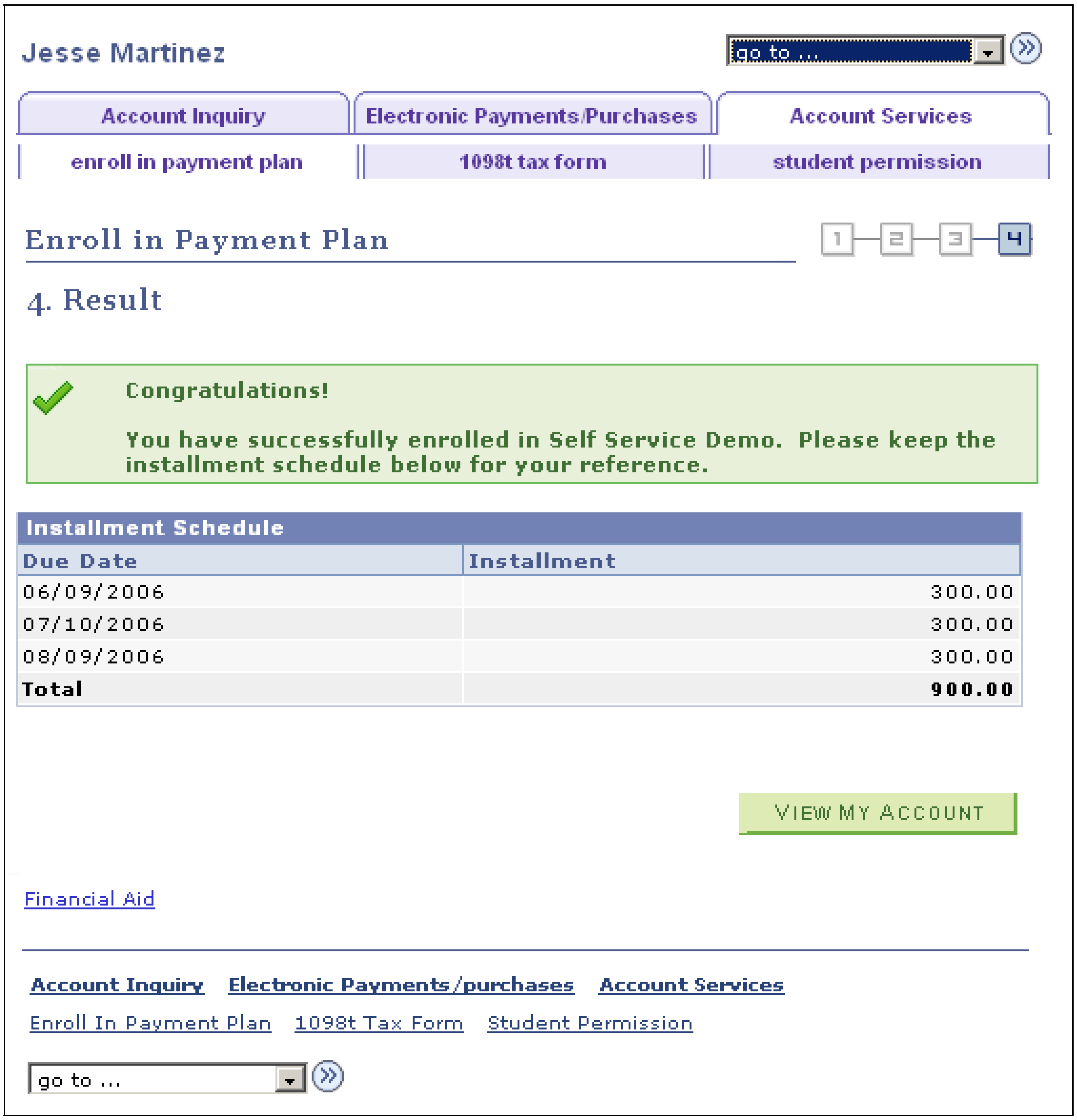
go to ...

Account Services - Enroll in Payment Plan - Agreement page (2 of 2)

Administrators can use the Review Self Service Agreements page to view enrollment agreement data.

Results

Access the Account Services - Enroll in Payment Plan - Result page (Self Service, Campus Finances, Account Services - Enroll in Payment Plan - Agreement and click the Next button).



Account Services - Enroll in Payment Plan - Result page

Administrators can use the *Review Self Service Agreements* page to view enrollment agreement data.

Viewing the 1098-T Form

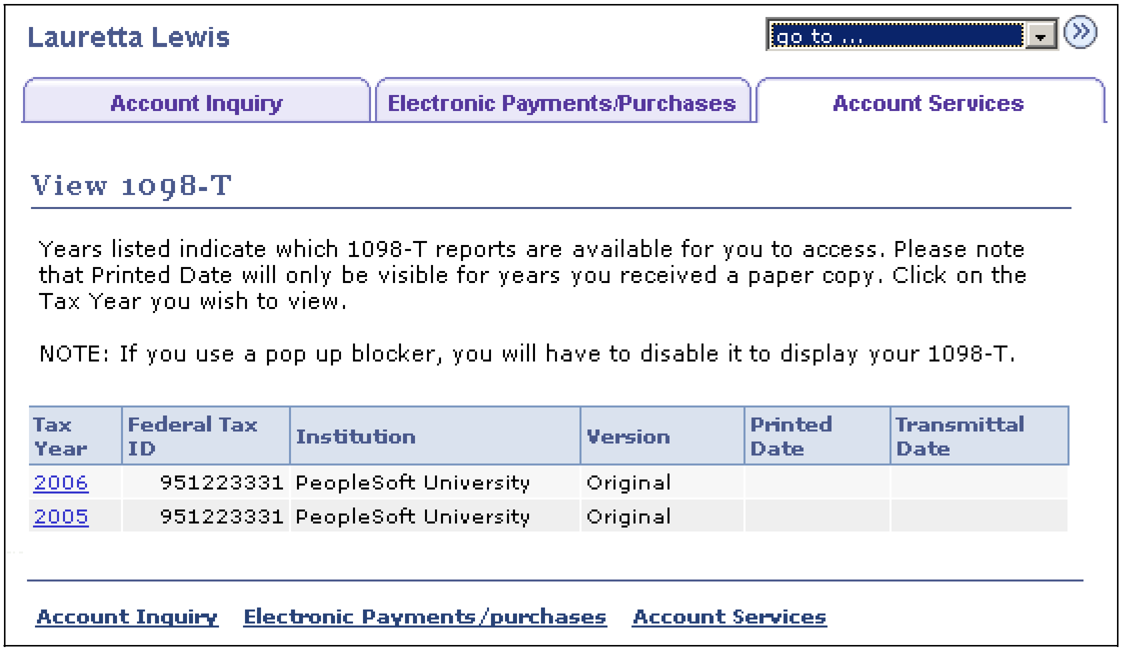
The 1098-T is an Internal Revenue Service (IRS) form that reports tuition and related expenses that a student can use to claim an educational tax credit.

Student Financials enables a student to view and reprint a substitute copy of the 1098-T after having received a paper copy through postal mail.

It also enables the student to consent to accessing an electronic version of the 1098-T form through the student self-service feature.

On the View 1098–T page, the Box Amount tab enables the student to access the details for individual box amounts.

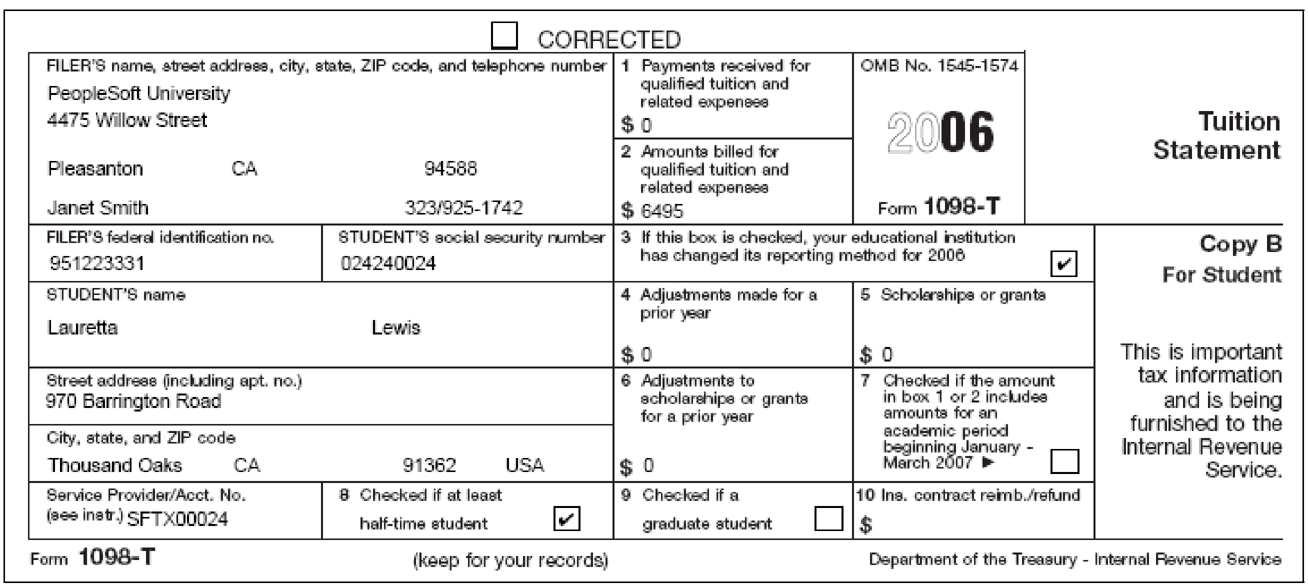
Access the Account Services - View 1098-T page (Self Service, Campus Finances, Account Services - View 1098-T).



Account Services - View 1098-T page

Select the tax year you want to view.

Access the 1098-T page.



CORRECTED

FILER'S name, street address, city, state, ZIP code, and telephone number
PeopleSoft University
4475 Willow Street
Pleasanton CA 94588
Janet Smith 323/925-1742

1 Payments received for qualified tuition and related expenses $ 0

2 Amounts billed for qualified tuition and related expenses $ 6495

OMB No. 1545-1574
2006
Form 1098-T

Tuition Statement

FILER'S federal identification no. 951223331

STUDENT'S social security number 024240024

3 If this box is checked, your educational institution has changed its reporting method for 2006 ✔

Copy B
For Student

STUDENT'S name
Lauretta Lewis

4 Adjustments made for a prior year $ 0

5 Scholarships or grants $ 0

Street address (including apt. no.)
970 Barrington Road

City, state, and ZIP code
Thousand Oaks CA 91362 USA

6 Adjustments to scholarships or grants for a prior year $ 0

7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2007 ▶

This is important tax information and is being furnished to the Internal Revenue Service.

Service Provider/Acct. No. (see instr.) SFTX00024

8 Checked if at least half-time student ✔

9 Checked if a graduate student

10 Ins. contract reimb./refund $

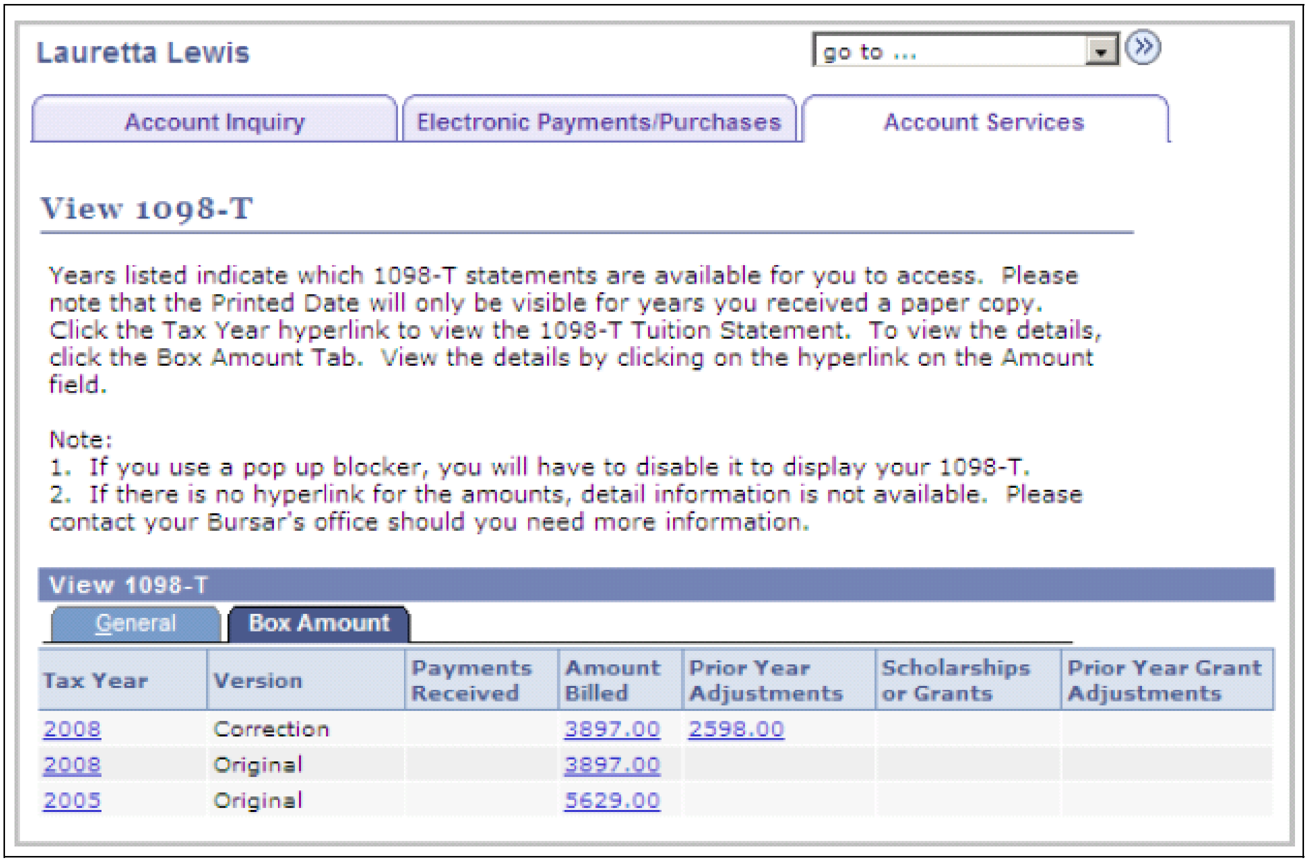
Form 1098-T (keep for your records) Department of the Treasury - Internal Revenue Service

1098-T page

Until you generate a 1098-T form for the current tax year, only previous years are available.

View 1098-T Amount Detail

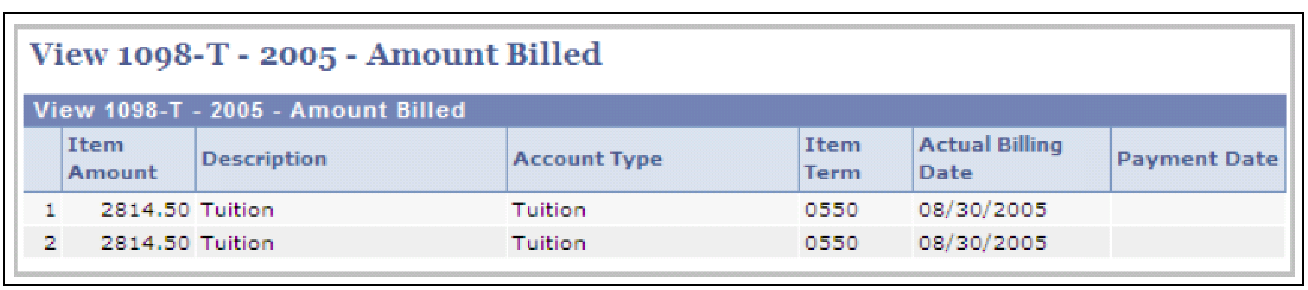
Access the Account Services - View 1098-T, Box Amount tab.



View 1098-T page, Box Amount tab

View the total amounts displayed on the 1098-T statement.

Access the View 1098- T - Amount Billed page.



View 1098-T- Amount Billed page

View the details of the eligible items billed for the calendar year. This includes the term for which the charged occurred.

Access the View 1098-T - Prior Year Adjustments page.

View 1098-T - 2008 - Prior Year Adjustments

View 1098-T - 2008 - Prior Year Adjustments						
	Item Amount	Description	Account Type	Item Term	Actual Billing Date	Payment Date
1	1299.00	Tuition	Tuition	0550	08/11/2008	
2	1299.00	Tuition	Tuition	0550	08/11/2008	

View 1098-T - Prior Year Adjustments page

View prior year adjustments to the amount billed for an aid year.

Access the View 1098-T - Scholarships or Grants page.

View 1098-T - 2008 - Scholarships or Grants

View 1098-T - 2008 - Scholarships or Grants						
	Item Amount	Description	Account Type	Item Term	Actual Billing Date	Payment Date
1	1000.00	Lake Michigan Polar Bear Schol	Tuition	0600		07/30/2008

View 1098-T - Scholarships or Grants page

View a detailed summary of the scholarship or grant for an aid year. This includes the type of account, offered amount and payment date.

Access the View 1098-T-Payments Received page.

View 1098-T - 2008 - Payments Received

View 1098-T - 2008 - Payments Received						
	Item Amount	Description	Account Type	Item Term	Actual Billing Date	Payment Date
1	2550.00	Payment-Check	Tuition	0600		08/18/2008
2	2550.00	Payment-Check	Tuition	0610		08/18/2008

View 1098-T - Payments Received page

View the payment received for an item. This includes the type of account and payment date.

Receiving the 1098-T Form Online

Your institution can provide the 1098-T form to students electronically. Students can consent to accessing an electronic version of the 1098-T form through student self service.

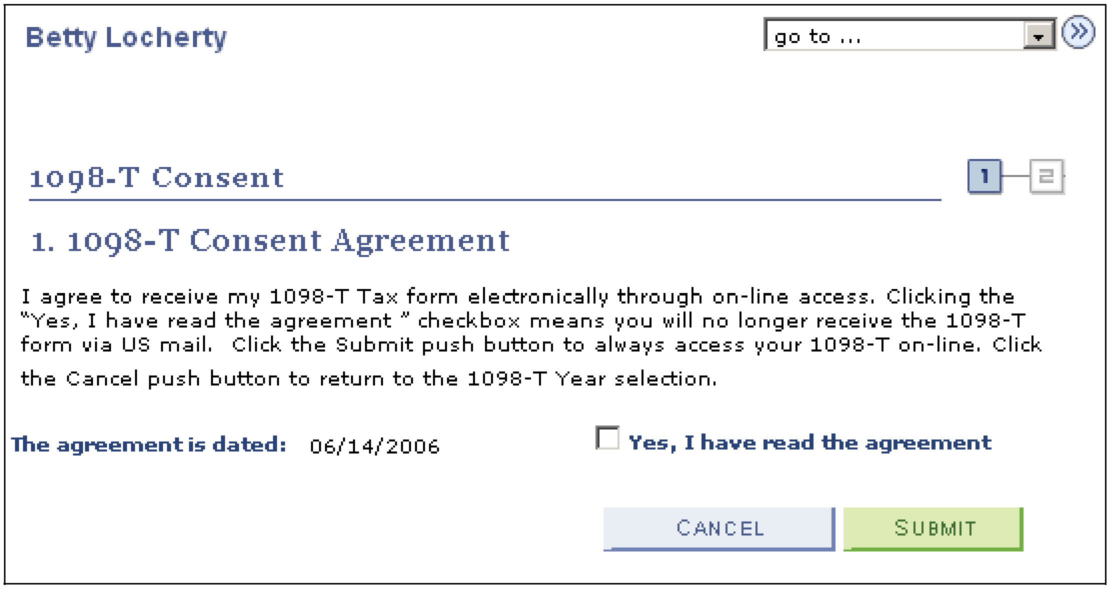
The student only sees the Consent Agreement for the 1098-T if they have *not* consented. Once consent to receive the 1098-T electronically is granted, the agreement is no longer needed.

Once consent is granted, it is effective for all years for which a 1098-T form was processed.

A student cannot revoke their consent online. Instead, the student must contact the institution to request that consent be revoked. Consent is revoked from an administrator page.

Completing the 1098-T Consent Agreement

Access the 1098-T Consent Agreement page (Self Service, Campus Finances, Account Services - View 1098-T, 1098-T Consent Agreement and click the Submit button).



1098-T Consent Agreement page

Yes, I have read the agreement Select to agree to receive 1098-T statements online.

Cancel Click to cancel submission of the 1098-T Consent Agreement.

Submit Click to submit the accepted 1098-T Consent Agreement.

Receiving the 1098-T Consent Confirmation

Access the 1098-T Consent Confirmation page.

1098-T Consent Confirmation page

This page confirms the 1098-T Consent Agreement.

View 1098-T Selection

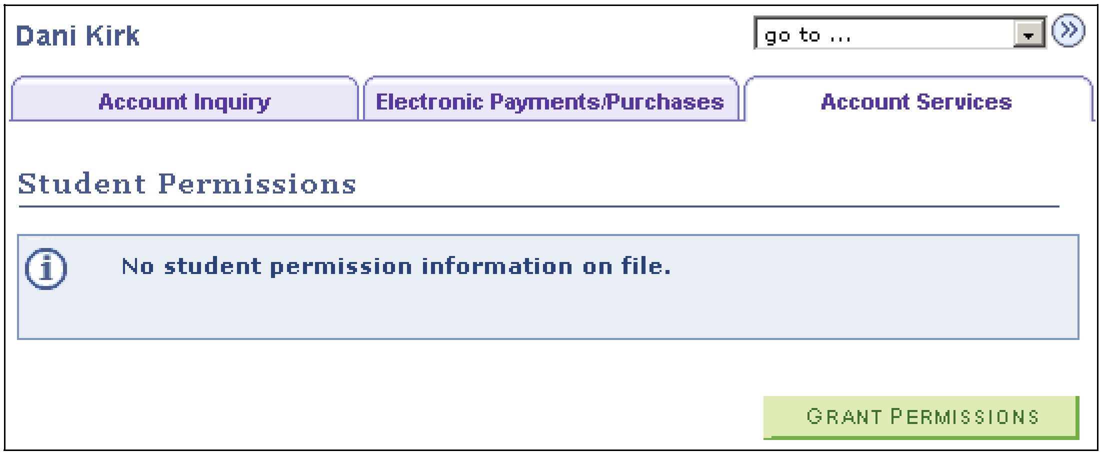
Click to select and view a 1098-T.

Administrators can use the *Review Self Service Agreement* page to view Enrollment agreement data.

Viewing Student Permissions

U.S. Department of Education regulations require that Title IV financial aid awards be used to pay only allowable charges, for example, tuition, mandatory fees, and contracted housing and board, for the period of enrollment covered by the aid year in which those funds are awarded. Regulations require schools to collect individual authorization from a student in order to pay non-allowable charges such as parking fees or library fines, or for the prior year immediately preceding the current year.

Access the Account Services - Student Permissions page (Self Service, Campus Finances, View Student Permissions, Account Services - Student Permissions).



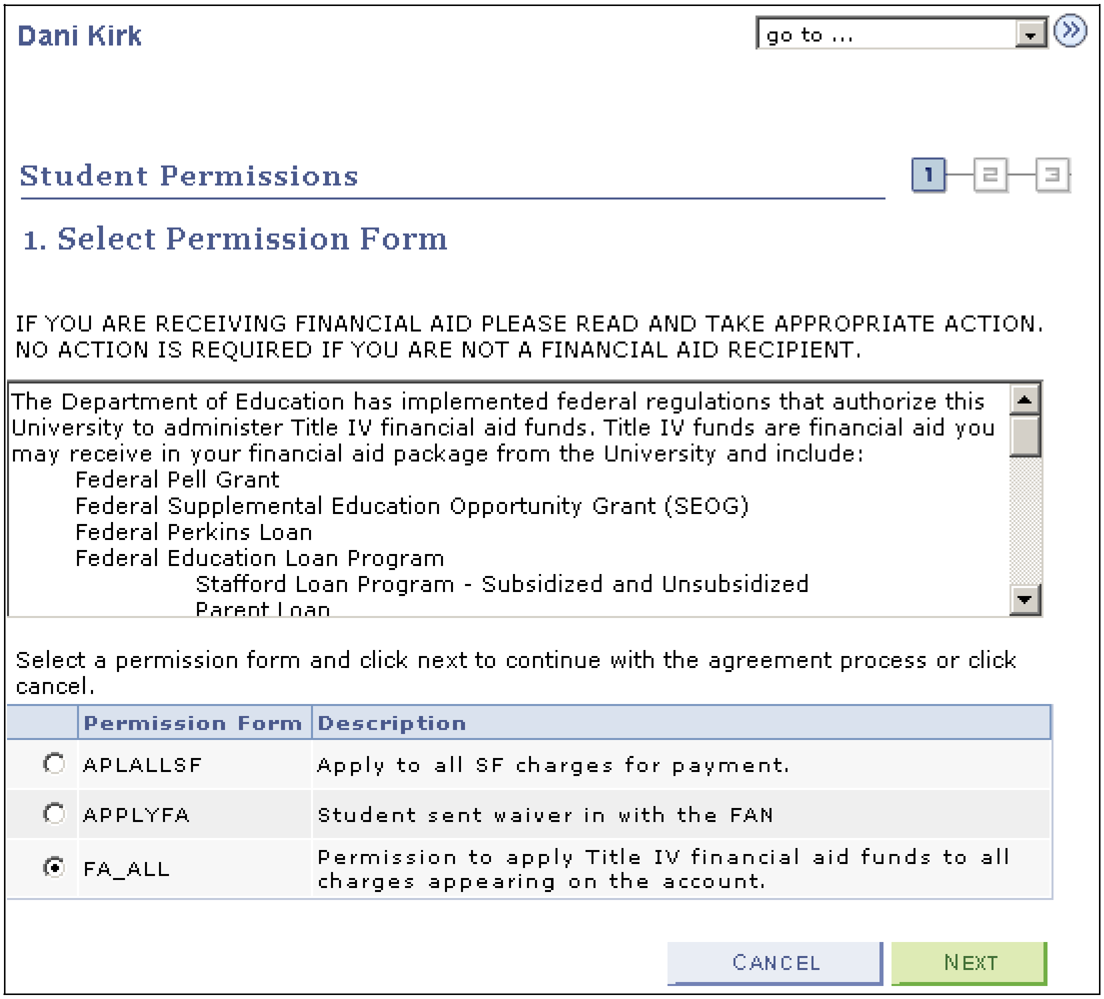
Account Services - Student Permissions page

This page enables the student to begin the grant permission self-service process.

Grant Permissions Click to grant permissions.

Selecting the Permission Form

Access the Select Permission Form page (Self Service, Campus Finances, View Student Permissions, Account Services - Student Permissions and click the .Grant Permissions button).



Select Permission Form page

This page enables the student to read the Disclosure Statement. If multiple permissions exist, the student can select only one and then select Next to complete the process. Then the student can select another permission for review and submission.

Granting Permission Using the Form Agreement

Access the Permission Form Agreement page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Select Permission Form and click the Next button).

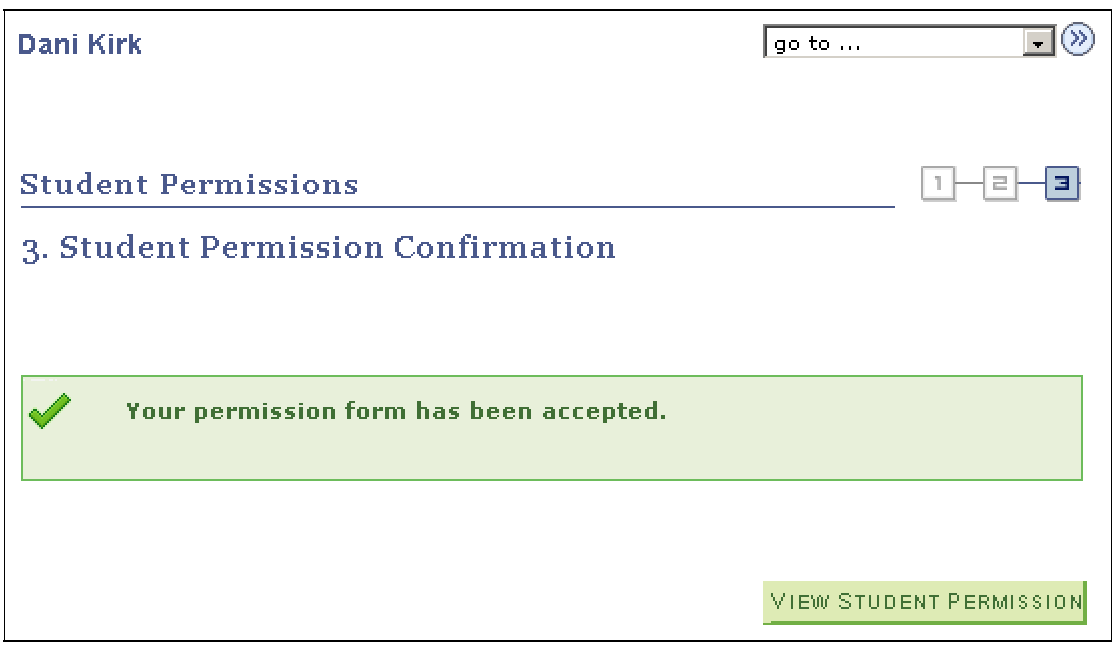
Permission Form Agreement page

This page enables the student to select the Yes, I have read the agreement check box to verify reading of the agreement and permission.

The student clicks Submit to submit the permission form agreement.

Confirming Student Permission

Access the Student Permission Confirmation page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Permission Form Agreement and click the Submit button).



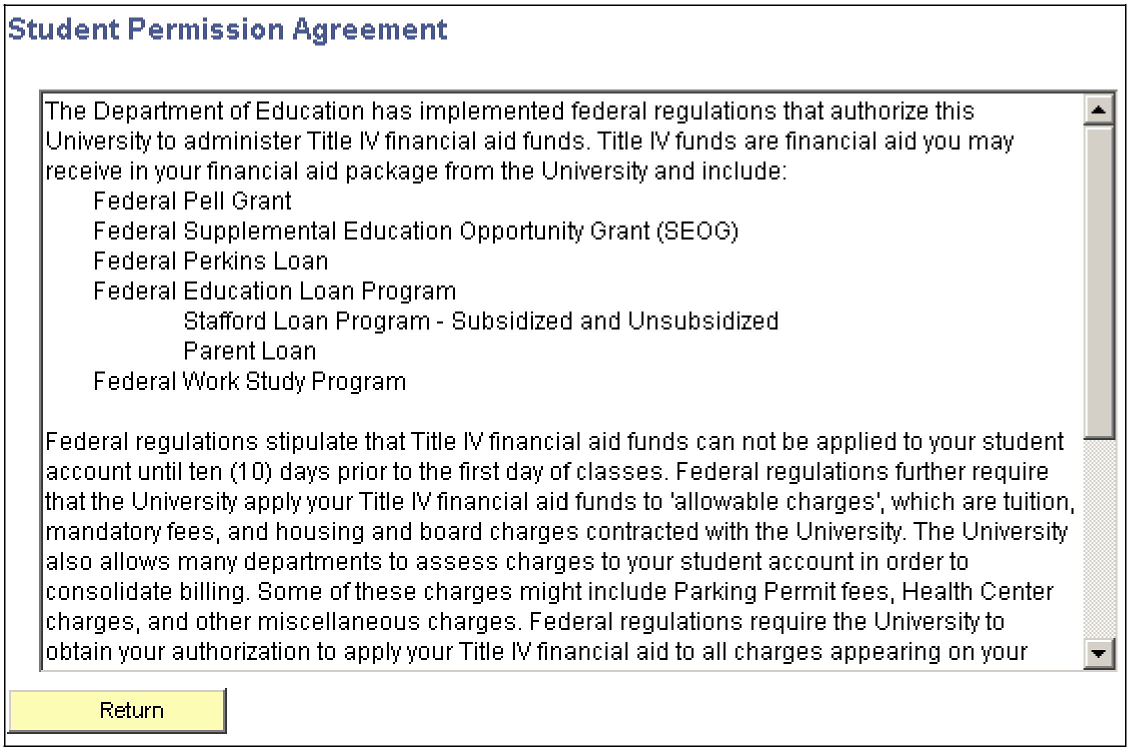
Student Permission Confirmation page

Click View Student Permission to return to the authorization page.

The student cannot revoke permission using self service; this can be done only by the administrator.

Viewing Student Permission Agreement

Access the Student Permission Agreement page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Student Permission Confirmation and click the Display Student Agreement link).



Student Permission Agreement page

The student can read the student permission agreement.

Chapter 18

Using Financial Aid Self Service

This chapter provides an overview of the self-service application and discusses how to:

- Accept, decline, and reduce awards.
- Report external awards.
- Print the FE FAN letter.
- Select a lender.
- Complete a loan counseling requirement.
- Use entry points into the Perkins eMPN process.
- Sign a Perkins eMPN.
- Request a paper MPN.
- View and sign a paper Perkins MPN.
- Use administrative requests.
- View student self-service pages by aid year.
- View student self-service pages by award period.

Understanding Financial Aid Self-Service

Students can view their financial aid data by aid year or award period, and accept, decline, and reduce awards. If your institution enters *Aid Year* in the View Summary By field on the Self Service Options page, the system displays data based on the aid year; if your institution enters *Award Period,* the system displays the data by award period.

To accept and decline awards, students can navigate to Self Service, Campus Finances, Accept/Decline Awards or Self Service, Student Center and click the Accept/Decline Awards link in the Finances group box on the Student Center page.

See Also

Chapter 7, "Setting Up Financial Aid Self-Service," Setting Up Self-Service Inquiry Options, page 68

Accepting, Declining, and Reducing Awards

This section discusses how students:

- Select an aid year.
- Accept, decline, and reduce awards using self-service.

Pages Used to Accept, Decline, and Reduce Awards

Page Name	***Definition Name***	***Navigation***	***Usage***
Financial Aid - Select Aid Year to View	SS_FA_AWD_AY_SEL	Self Service, Campus Finances, View Financial Aid, Select Aid Year to View Click the View Financial Aid link in the Finances group box on the Student Center page (Self Service, Student Center).	Access award acknowledgment for a particular aid year.
Financial Aid - Award Package	SS_FA_AWD_ACK	Self Service, Campus Finances, Accept/Decline Awards, Financial Aid – Award Package Click the Accept/Decline Awards link in the Finances group box on the Student Center page (Self Service, Student Center).	Accept, decline, and reduce awards.
Financial Aid - Award Detail	SS_FA_AWD_DTL	Click the Award link on the Financial Aid - Award Package page.	View scheduled disbursements by term and for each, the type of award, date, term, and award amount. If set up for lender selection, the student can also select a lender.

Selecting an Aid Year

Access the Financial Aid - Select Aid Year to View page.

The student selects the aid year for which he wants to accept, reduce, or decline awards on the Financial Aid - Select Aid Year to View page. The system displays all aid year and institution combinations for which the student is in attendance. If the student is in attendance at more than one institution, you cannot restrict the view to a single institution or aid year.

If you selected the Print Letter Option to *Print* in setup, the system displays all noncanceled awards for the student for the selected aid year. If total aid is greater than zero and the Print option does not equal *Print,* the link for that year is disabled, and the system displays *Award access not available.* instead of the aid year description. If the Allow Access check box is cleared on the Self Service Options page, the system displays *No self service access for this aid year.* If the Award Access check box is cleared on the Packaging Status Summary page for this student, the system displays *Award not available.*

If a student declines all awards and subsequently attempts to access self service award acknowledgment, the system does not activate the aid year for which the student declined all awards.

Accepting, Declining, and Reducing Awards Using Self-Service

Access the Financial Aid - Award Package page.

The first time the student accesses the Financial Aid - Award Package page, the system displays the package status as New Package. For students who have submitted an award acknowledgment prior to this entry, the system displays an active Previous Transactions link.

The system displays the most current award package and a corresponding status. The date/time field displays the last time the award package was updated. When action is taken against the award data or the award data is accessed, the system initiates a date and time stamp.

The system applies the following rules:

- An award with a disbursed balance greater than zero cannot be adjusted during self-service activity. However, a student can modify awards with an authorized balance greater than zero.
- If the FA Item Type self-service action setup is specified as a reduction, the student can reduce awards in self-service and reduce awards with the following attributes: Professional Judgment, Need Override, Override, or Lock Flag based on FA Item Type self-service action setup.
- If the loan award allows for reductions based on the FA Item Type self-service action setup, the system ensures that the Offered amount and the Accepted amount are the same after the award is processed.

Note. Oracle recommends that you use the user-defined text delivered with this product to define awarding rules and instructions for your students. For example, if a student cannot reduce an award in self-service, a clarification as to why the student cannot modify the award will be useful. Examples of user-defined text are *Award is disbursed* and *Loan is in transit.*

Status

The processing option that you selected on the Awarding Options setup page affects the status. If you selected Batch, the outcome is *Pending Update* until you run the batch process. After you run the batch process, the outcome can be *Successful, Successful with Adjustments, Revised Package, Rejected,* or *Needs Review.* If you select Real Time, the outcome is *Successful, Successful with Adjustments, Rejected,* or *Needs Review.*

The Status values are:

New Package: No previous self-service activity exists and the student is eligible to receive awards. The student can accept, decline, or reduce any or all of the currently available awards.

Needs Review: The system cannot process one of the student's awards and post the changes because it found errors while processing an award. The system displays the awards as view-only and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

Here are some examples of situations resulting in *Needs Review* status:

- The fiscal balance is below the submitted accepted or reduced amount.
- The disbursement ID of the self-service disbursement record does not match the system's disbursement IDs associated with the disbursement plan found in the corresponding award.
- The student reduces an award for which the term limit contains cents, but the award remainder rule specifies first or last dollars.

Pending Update: The student submitted the award acknowledgement and can revisit this page to determine whether the acknowledgement, changes, or both are accepted and make changes in the existing package. The student does not see the revised, reduced, or updated award amounts on the Financial Aid - Disbursement Schedule page until the batch process has been run.

Rejected: The system cannot process the student's acknowledgment, adjustments, or both and post the changes because the system detects errors during initialization and setup. All awards are rejected. The system displays the awards as view-only and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

*Revised Package:*The student submitted an award acknowledgment and the financial aid staff revised the student's financial aid package since the student last submitted a transaction. The student can accept, reduce, or decline any or all of the awards that are currently available.

Successful: The system successfully processed the acknowledgement, changes, or both that were submitted by the student.

Successful with Adjustment: The system successfully processed the student's award acknowledgment, but made adjustments to one or more awards. If the student reduced one or more awards below the minimum amount allowed, the system adjusts the awards to the minimum limit amount and returns this status.

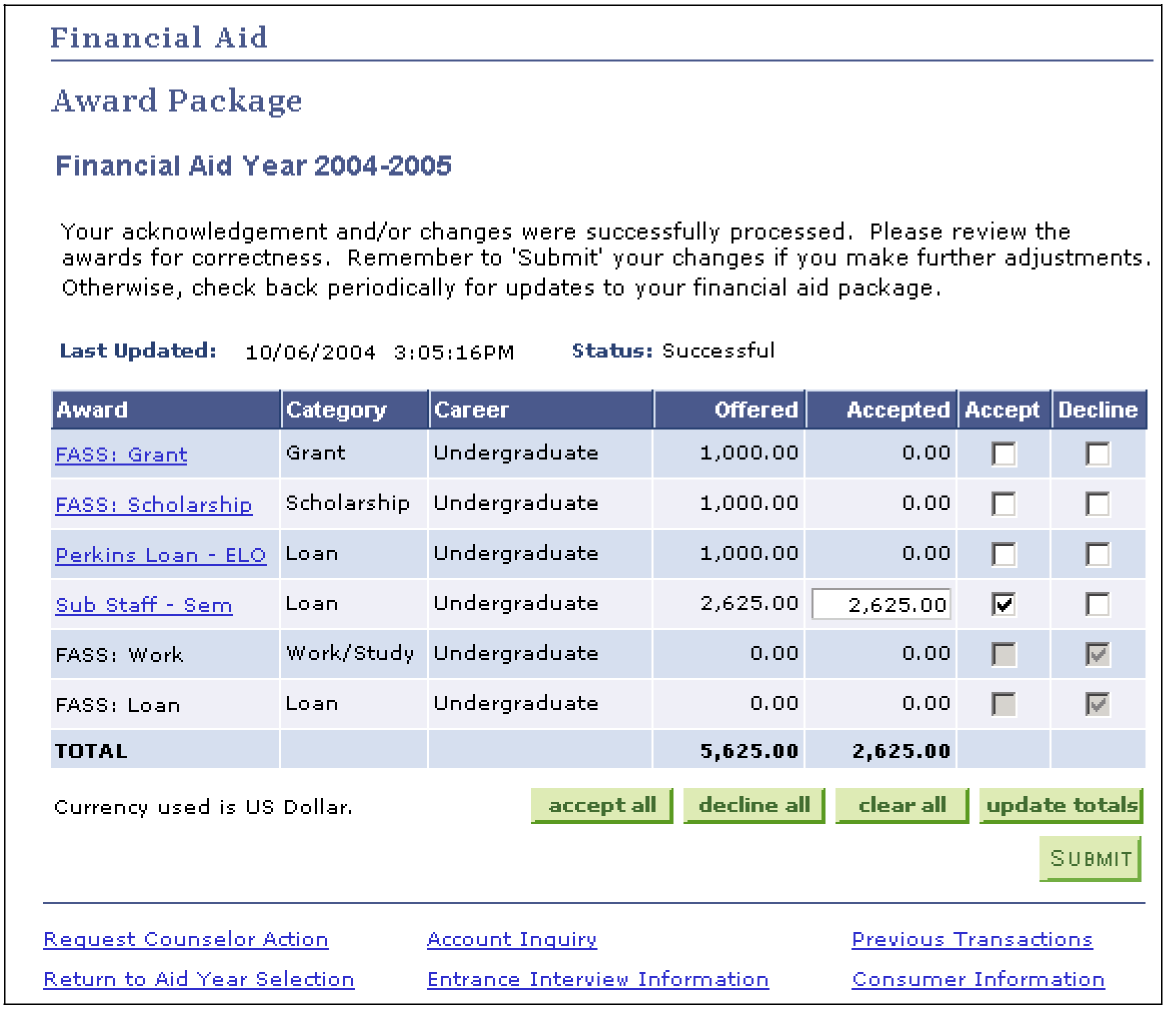
Award

This link is available only for nonzero awards.

Category	The award category is based on the Financial Aid Type field on the FA Item Type 1 setup page.
Career	If the student has multiple careers, the system displays all awards from all careers.
Accepted	The amount accepted by the student for this award or auto-accepted by the packaging process. If reductions are permitted on the award—FA Item Type Self Service Actions option—this field is available for reduction after the student selects the Accept check box.
Accept	In administrative packaging, you can award a student an item type and set it automatically as *Offer/Accept.* For these awards, the system checks this Accept check box. For example, an administrator sets a work-study program award to *Offer*, and the Accept check box is cleared, giving the student the option to accept the award.
Decline	After this check box is selected, the system reduces the accepted amount to zero. If declines are not permitted on this award—FA Item Type Self Service Actions option—this field is not available to the student.

Example of No Link on a Declined Award

When a student declines one or more awards while other awards are either in Offered or Accepted status, the system does not display a link for the declined award because no scheduled disbursements exist for that award. In the following example, the student declined the FASS: Work and FASS: Loan awards. These awards do not have a link to the Financial Aid - Award Detail page.



Financial Aid

Award Package

Financial Aid Year 2004-2005

Your acknowledgement and/or changes were successfully processed. Please review the awards for correctness. Remember to 'Submit' your changes if you make further adjustments. Otherwise, check back periodically for updates to your financial aid package.

Last Updated: 10/06/2004 3:05:16PM **Status:** Successful

Award	Category	Career	Offered	Accepted	Accept	Decline
FASS: Grant	Grant	Undergraduate	1,000.00	0.00	☐	☐
FASS: Scholarship	Scholarship	Undergraduate	1,000.00	0.00	☐	☐
Perkins Loan - ELO	Loan	Undergraduate	1,000.00	0.00	☐	☐
Sub Staff - Sem	Loan	Undergraduate	2,625.00	2,625.00	☑	☐
FASS: Work	Work/Study	Undergraduate	0.00	0.00	☐	☑
FASS: Loan	Loan	Undergraduate	0.00	0.00	☐	☑
TOTAL			**5,625.00**	**2,625.00**		

Currency used is US Dollar.

accept all decline all clear all update totals

SUBMIT

Request Counselor Action Account Inquiry Previous Transactions

Return to Aid Year Selection Entrance Interview Information Consumer Information

Award Package example

The system does not require a student to make changes to the page. If the student clicks Submit without making changes to the package, the system displays the status as *Successful* in real-time processing and *Pending Update* in batch processing.

Unlike administrative packaging, in which the packaging routine performs extensive edits to ensure the validity of an award, in self-service, the system processes awards in passive mode and does not perform any federal edits or evaluate the student for eligibility or need criteria. The system performs a subset of edits on any award that is being reduced. Also, the system adjusts an award that has been reduced below minimum amounts established for the system.

Reporting External Awards

This section provides an overview of reporting external awards and lists the pages used to report external awards.

Understanding Reporting External Awards

The Reporting External Award component enables students to provide information regarding any external awards not already reflected on their award package. Self-service options control whether the component is accessible from the Accept/Decline and View Financial Aid pages and the Packaging Status Summary page. External awards reported by students are considered a data source to External Award staging tables. All student-reported awards are posted directly to External Award staging tables and automatically set with a processing status of *Reported* and data source of *Self Serve.* The system-set process status of *Reported* on external award transactions reported by the student require administrator review before any potential posting to the student award package.

Administrators use a Comment field to enter the status of self-service reported external awards. They also indicate whether comments should be viewable to a student. These comments are displayed on the Award Detail page, from awards listed on the Aid from Other Aid-Report History page.

Pages Used to Report External Awards

Page Name	***Definition Name***	***Navigation***	***Usage***
Financial Aid - Aid from Other Sources	SFA_SS_EA_VIEW	• Self Service, Student Center, Report Other Financial Aid • Self Service, Campus Finances, Aid from Other Sources, (aid year)	Report aid from other sources. When the student clicks the SAVE button, the information is saved to the external award staging table with a status of *Reported.*
Financial Aid - Other Financial Aid Received	SFA_SS_EA_ENTRY	Click the REPORT ADDITIONAL AID button on the Financial Aid - Aid from Other Sources page.	Report aid from other sources. When the student clicks the SAVE button, the information is saved to the external award staging table with a status of *Reported.*
Financial Aid - Aid from Other Sources - Report History	SFA_SS_EA_HISTORY	Click the View My Reporting History link on the Financial Aid - Aid from Other Sources page.	View all student-reported transactions. Use the Award link to access student award details and any administrative comments made visible to self-service.

Page Name	Definition Name	Navigation	Usage
Financial Aid - Aid from Other Sources - Award Detail	SFA_SS_EA_DETAIL	Click the award description to view award details.	View award details, such as processing status, for an external award. Also view a list of other external awards that might make up the total award amount. When accessed from the Report History page, award details can include comments from the administrator. The Award Details page is available when the award name is highlighted.

Printing the FE FAN Letter

When students click the View Award Notification link from the Financial Aid - Award Summary page or the Financial Aid - Award Package page, a pop-up window displays the Award Notification letter in PDF format.

Selecting a Lender

This section provides an overview of lender selection and discusses how to view lenders selected by the students.

Understanding Lender Selection

Lender Selection enables students to select an FFELP lender or to change a previously assigned lender:

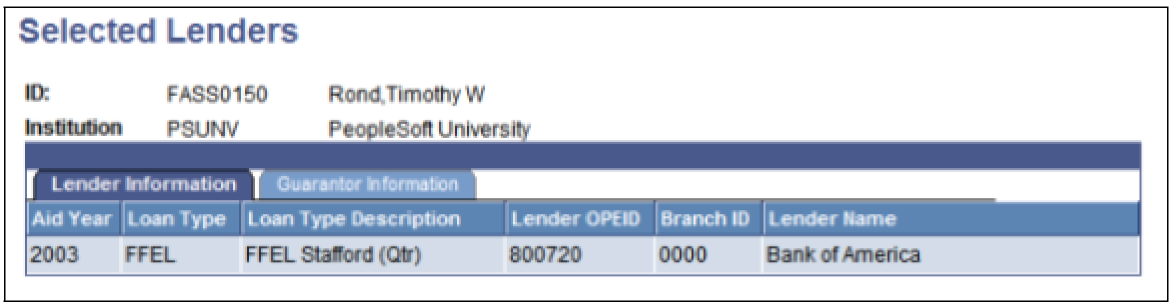
- If the student has not been awarded, the system provides a Student Finances link to indicate a lender to be picked up by Loan Origination.
- If a student has been awarded an FFELP loan, the system displays the lender and provides a link that enables the student to change the lender if the loan is not originated or transmitted to the guarantor.
- If a student changes the lender after borrowing from another lender, a message is optionally displayed to warn them against doing so for repayment reasons.
- If the loan has been originated or transmitted, the lender is displayed but the student cannot change it. A message tells the student to contact the financial aid office if they need to change the lender.

Pages Used to Select and View a Lender

Page Name	***Definition Name***	***Navigation***	***Usage***
Lender Select	SS_LNDR_SELECT	Click the Select Your Lender link on the Financial Aid - Award Detail page .	Select or change a lender. The student can select one lender for all loans. After the student clicks the SUBMIT button, the student cannot change lenders without contacting the financial aid office.
Selected Lenders	SS_LNDR_SELECT	Financial Aid, Loans, View Lender Selection	View the lenders that students selected through Campus Self Service.

Viewing a Student's Lender Selection Record

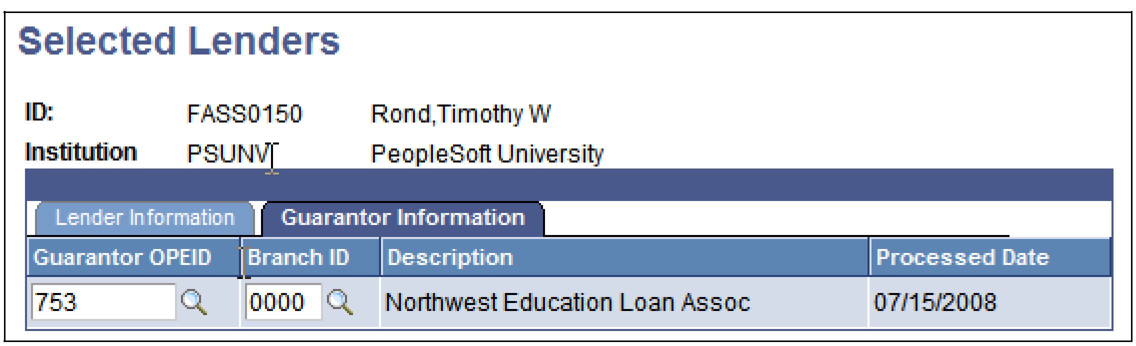
Access the Selected Lenders page (Financial Aid, Loans, View Lender Selection).



Selected Lenders page, Lender Information tab

The Lender Information tab displays the lender that was selected by the student through Campus Self Service.

Select the Guarantor Information tab.



Selected Lenders page, Guarantor Information tab

The Guarantor Information tab displays the guarantor that was associated to the lender selected by the student. The guarantor is associated to the lender based on values defined on the Identify Self Service Lenders page.

Note. The Lender and Guarantor values on this page are used to determine the correct loan destination during loan origination. If the Guarantor values are missing, it is possible that the loan could be originated with no loan destination found.

Processed Date Displays the date that the student selected the lender in Campus Self Service.

Completing a Loan Counseling Requirement

This section provides an overview of a loan counseling requirement and lists the page used to complete a loan counseling requirement.

Understanding a Loan Counseling Requirement

After the student accepts an award and the loan is originated, the system displays a link to entrance interview information for each award. This URL is specified on the Loan Counseling page and associated display parameters are set on the Loan Options page.

The student clicks the link to access the loan information. After the student demonstrates familiarity with the information, the administrator can change the Loan Entrance Interview Status field value on the Packaging Status Summary page from *Inst Req* to *Completed.*

Similarly, if an exit interview is required, the link is displayed in the program completion timeframe set on the Loan Counseling page. The student accesses the information and after demonstrating familiarity with the information, the administrator changes the Exit Interview field value on the Packaging Status Summary page from *Inst Req* to *Completed.*

Page Used to Complete a Loan Counseling Requirement

Page Name	*Definition Name*	*Navigation*	*Usage*
Entrance/Exit Loan Counseling	SS_LN_COUNSEL	Self Service, Campus Finances, View Financial Aid, Award Summary, Loan Counseling link	Click the Award Description link to access the URL that has been selected on the Loan Counseling page to display loan requirement details for this award.

Using Entry Points into the Perkins eMPN Process

This section provides an overview of Perkins eMPN functionality and discusses how to:

- View Perkins loan award details.
- View Perkins loan award summary.

Understanding Perkins eMPN Functionality

The Perkins eMPN process supports the requirement that schools use the Perkins Master Promissory Note (MPN) and provide the option for students to complete and sign their Perkins MPN electronically. To comply with regulatory disclosure and notification requirements for the federal Perkins loan, the system includes specific disclosure items. In addition, most self-service pages allow for site-defined text so that institutions can include specific wording that satisfies their requirement as a holder of the Perkins loan.

Students can access the eMPN process to view their promissory note information using the Accept/Decline Awards, View Financial Aid, Sign Perkins Promissory Note, or View Perkins Promissory Note menu paths. Contained within the process are pages that acknowledge borrower rights and responsibilities, disclosures, terms and conditions, and important notices to complete the eMPN process. The system presents information to the student using both static data and user-defined text.

The Perkins eMPN pages have cancel buttons so that students can exit the Perkins eMPN process at any point. If a student cancels, the system discards any data that the student entered. When students access the electronic signature process, they are instructed to enter an identity authentication element: NID, DOB, or user-defined PIN. The institution determines the identity authentication prompt during setup. Students must select a check box to indicate consent to proceed with the Perkins eMPN process. The system authenticates the information and captures the date and time of the consent. To continue and complete the process, students must verify that their personal information is correct, provide loan references, review loan indebtedness and repayment schedule, review and accept their rights and responsibilities, and review and electronically sign their federal Perkins Master Promissory Note. The system provides pages for students to review current and history information regarding their Perkins MPN.

Oracle recommends that you use the user-defined text to define instructions and information for your student population. The text on Perkins eMPN pages can be easily modified to best meet your institutional requirements. These user-defined text messages are contained within Message Set Number 14409. Message Set Number 14409, 500 number series, are user-definable messages for Financial Aid Self Service pages.

The system is designed to dynamically provide various entry points within the Campus Finances menu for the student to begin the eMPN process: Sign Perkins Promissory Note, Accept/Decline Awards, and View Financial Aid. The system evaluates whether a valid Perkins MPN is present. At a minimum, the student must accept a Perkins loan before being allowed to access the Perkins eMPN process.

Note. If a valid Perkins MPN is present, the system dynamically provides links at entry points for the student to view Perkins Promissory Note history pages.

Pages Used as Entry Points into the Perkins eMPN Process

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid - Award Package	SS_FA_AWD_ACK	Self Service, Campus Finances, Accept/Decline Awards, Financial Aid - Award Package	Accept, decline, and reduce awards. This page also facilitates entry into the Perkins eMPN process.
Financial Aid - Award Detail	SS_FA_AWD_DTL	Click the Federal Perkins Loan – MPN link on the Financial Aid - Award Package page.	View scheduled disbursements by term. This page displays the type of award, date, term, and award amount. It also facilitates entry into the Perkins eMPN process.
Financial Aid - Award Summary	SS_FA_AWD_SUMM_PER	Self Service, Campus Finances, View Financial Aid, Financial Aid – Award Summary	View a detailed summary of financial aid by aid year. This includes the type of award and the offered and accepted amounts for the aid year and terms within the aid year. This page also facilitates entry into the Perkins eMPN process.
Accept/Decline Financial Aid - Submit Confirmation	SFA_SUBMIT_CONFIRM	Click the Yes button on the Accept/Decline Financial Aid page.	View submittal confirmation. If the system determines that a Perkins MPN is required, then additional instructions and buttons enable students to access the Perkins eMPN process.

Viewing Perkins Loan Award Details

If the award has the MPN Required option, the system provides a link to the Perkins Loan Promissory note on the Financial Aid - Award Detail page.

If the award has a completed and valid MPN record, the Perkins Loan Promissory Note link takes the student to the Perkins Promissory note history page. If the award does not have a valid MPN record and the award is accepted, the link takes the student to the introductory page for the Perkins eMPN process.

Viewing Perkins Loan Award Summary

If the item type has the MPN Required option, the award is accepted, and the system determines that a valid MPN has not yet been completed, then the system displays a Sign Perkins MPN link on the Financial Aid - Award Summary page. The student can click the link to access the introductory page for the eMPN process.

The system displays the View Promissory Note link if a valid MPN has been completed for the award. The link directs the student to the View Promissory Note page.

See Also

Viewing a Detailed Summary of Financial Aid by Aid Year

Signing an Electronic Perkins eMPN

This section discusses how to:

- Review Perkins eMPN introductory information.
- Enter an ID authentication and provide consent.
- Verify personal information.
- Provide loan references.
- Review loan indebtedness.
- Accept borrower rights and responsibilities.

Pages Used to Sign an Electronic Perkins MPN

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid - Select Aid Year to View	SFA_SS_EMPN_AY_SEL	Self Service, Campus Finances, Sign Perkins Promissory Note, Financial Aid - Federal Perkins Master Promissory Note	Select the aid year that you want to view.
Financial Aid - Federal Perkins Master Promissory Note (Introductory Information)	SFA_SS_EMPN_START	Click the Aid Year link on the Financial Aid - Select Aid Year to View page.	Review introductory information and instructions to proceed with the electronic MPN. User-defined text messages for this page are contained within Message Set Number 14409, 560–570 series.

Page Name	***Definition Name***	***Navigation***	***Usage***
Financial Aid - Federal Perkins Master Promissory Note (ID and Consent)	SFA_SS_EMPN_AUTH	Click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (Preliminary Information) page.	Review steps for completing the electronic signature and provide identity authentication and acknowledge consent to proceed with the eMPN process. User-defined text messages for this page are contained within Message Set Number 14409, 571.
Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information)	SFA_SS_PERK_EMPN1	Click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (ID and Consent) page.	Verify name, address, telephone, and demographic information.
Addresses	SS_ADDRESSES	Click the Click to update Address link on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.	Update address information.
Phone Numbers	SS_CC_PERS_PHONE	Click the Click to update Phone link on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.	Update telephone numbers.
Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References)	SFA_SS_PERK_EMPN2	Click the Confirm button on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.	Enter loan references information. User-defined text messages for this page are contained within Message Set Number 14409, 572.
Financial Aid - Federal Perkins Master Promissory Note (Review Loan Indebtedness)	SFA_SS_PERK_EMPN3	Click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References) page.	Review the total federal Perkins loan amount that the student has incurred at your institution. Amounts are determined by the valid school code for institution setup. Students can use this page to view a statement of the total cumulative balance they owe and an estimate of the monthly payment amount. User-defined text messages for this page are contained within Message Set Number 14409, 573.

Page Name	***Definition Name***	***Navigation***	***Usage***
Financial Aid - Federal Perkins Master Promissory Note (Accept Borrower's Rights and Responsibilities)	SFA_SS_PERK_EMPN4	Click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Review Loan Indebtedness) page.	Accept borrower's rights and responsibilities. User-defined text messages for this page are contained within Message Set Number 14409, 574–576 series
Federal Perkins Loan Master Promissory Note	SFA_SS_PERK_EMPN5	Click the I Accept button on the Financial Aid - Federal Perkins Master Promissory Note (Accept Borrower's Rights and Responsibilities) page.	Review terms and conditions, disclosure of information, and important notices. Sign the note electronically.
Electronic Signature Confirmation	SFA_SS_ESIGN_YESNO	Click the Sign Perkins Note button on the Federal Perkins Loan Master Promissory Note page.	Captures the borrower's consent to electronically sign the Perkins MPN.
Federal Perkins Master Promissory Note (Completed Signature Confirmation)	SFA_SS_EMPN_CONFRM	Click the Yes button on the Electronic Signature Confirmation page.	View confirmation for completion of the electronic signature process.
Financial Aid - Federal Perkins Master Promissory Note	SFA_SS_EMPN_EXISTS	Select the Aid Year on the Financial Aid - Select Aid Year to View page.	View a message indicating that a valid Perkins Promissory Note is on file.

Reviewing Perkins eMPN Introductory Information

Access the Financial Aid – Federal Perkins Master Promissory Note (Introductory Information) page (click theAid Year link on the Financial Aid - Select Aid Year to View page).

The Financial Aid - Federal Perkins Master Promissory Note (Introductory Information) page represents the first page in the Perkins eMPN process. This page introduces a student to the Perkins eMPN process and provides a listing of items that should be readily available before continuing. The page provides the means to define key elements within the eMPN process. To assist the student, a listing of information is available prior to continuing the eMPN process. Item 1 is a controlled item and automatically adjusts based on the authentication method option selected on the self-service awarding option for the Perkins MPN.

The student selects the REQUEST PAPER MPN (request paper master promissory note) button to request a paper MPN. The system displays a PDF version of the Perkins MPN in a new window.

See Also

Pages Used to Request and Sign a Promissory Note

Entering an ID Authentication and Providing Consent

Access the Financial Aid - Federal Perkins Master Promissory Note (ID and Consent) page (click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (PreliminaryInformation) page.

If your institution set the Authentication Method option on the Awarding Options page to *No authentication,* the system does not display text that requests students to enter an identity authentication on the Financial Aid - Federal Perkins Master Promissory Note (ID and Consent) page.

Oracle recommends that you use the user-defined text message delivered with this product to define instructions for your students. For example, your institution might require additional consent items to satisfy disclosure requirements. The Perkins eMPN user-defined text messages are contained within the Message Set Number 14409.

Verifying Personal Information

Access the Financial Aid – Federal Perkins Master Promissory Note (Verify Personal Information) page (click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (ID and Consent) page).

Regulations require a permanent address to be captured on the Perkins MPN. The Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page displays the most current permanent address and home telephone number for the student. Students can use the available links on the page to access the Self Service Campus Personal Information address and home components. If students click either the address or phone update link, they are removed from the eMPN process and must begin the eMPN process from the start.

Note. The system does not allow a student to proceed without a current permanent address.

Providing Loan References

Access the Financial Aid – Federal Perkins Master Promissory Note (Provide Loan References) page (click the Confirm button on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page).

The Perkins eMPN process requires that the student provide at least two loan references. Institutions can require up to three additional loan references. If additional references are required, the system adds an extra step on the Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References) page. The third step requests that the student provide additional references beyond the two.

Reviewing Loan Indebtedness

Access the Financial Aid – Federal Perkins Master Promissory Note (Review Loan Indebtedness) page (click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References) page).

On the Financial Aid – Federal Perkins Master Promissory Note (Review Loan Indebtedness) page, the Federal Perkins Loan Amount to Date field indicates the amount based on awards associated with the Perkins aggregate.

The award amount represents any financial aid item type for which the aggregate area is tied to Perkins, even if the item type is not flagged as MPN-required. The system keys loan history amounts by school code. Therefore, the system consolidates and displays only loan amounts that are associated with valid school codes for the institution.

Accepting Borrower Rights and Responsibilities

Access the Financial Aid – Federal Perkins Master Promissory Note (Accept Rights and Responsibilities) page (click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Review Loan Indebtedness) page).

The Financial Aid - Federal Perkins Master Promissory Note (Accept Borrower's Rights and Responsibilities) page provides the student (borrower) the necessary disclosures regarding rights and responsibilities. The entire text displayed is user-defined text. Oracle recommends that schools adjust the text to satisfy necessary disclosure requirements.

Requesting and Signing a Paper Perkins MPN

This section provides an overview of paper MPN requests and lists the pages used to request and sign a paper Perkins MPN.

Understanding Paper Perkins MPN Requests

Regulations require that a student (borrower) be given the opportunity to exit the Perkins eMPN process, and instead, request a paper Perkins MPN. When the student requests a paper Perkins MPN, the system generates a PDF version of the Perkins MPN with both Sections A and B completed. The system instructs the student to print, complete, and return the Perkins MPN to the financial aid office.

When the system generates a paper Perkins MPN, it creates a Perkins MPN record with the MPN format equal to paper. The system considers this Perkins MPN invalid until a signature date is entered.

Note. If the paper Perkins MPN remains invalid, the student can return and attempt the Perkins eMPN process again. If the student completes and electronically signs the Perkins MPN, the system cancels the previous paper Perkins MPN and creates a subsequent Perkins MPN indicating a completed electronic Perkins MPN.

Pages Used to Request and Sign a Paper Perkins MPN

Page Name	Definition Name	Navigation	Usage
Federal Perkins Master Promissory Note	SFA_SS_EMPN_PAPER	Click the Request Paper MPN link on the Financial Aid - Federal Perkins Master Promissory Note (Preliminary Information) page.	Confirm a request for a paper MPN. The student is requested to print, complete, and return the signed paper promissory note.
Financial Aid - Federal Perkins Master Promissory Note	SFA_SS_EMPN_EXISTS	Click the Continue button on the Federal Perkins Master Promissory Note page.	View a reminder to turn in the signed paper MPN to the financial aid office.

Viewing a Perkins MPN

This section lists the pages used to view Perkins promissory notes.

Pages Used to View a Perkins Promissory Note

Page Name	Definition Name	Navigation	Usage
Financial Aid - Federal Perkins Master Promissory Note (View MPN Information)	SFA_SS_EMPN_VIEW	Self Service, Campus Finances, View Perkins Promissory Note, Federal Aid - Federal Perkins Master Promissory Note	View Perkins MPN information. User-defined text messages for this page are contained within Message Set Number 14409, 578.
Financial Aid - Federal Perkins Master Promissory Note (Promissory Note History)	SFA_SS_EMPN_HISTVW	Click the View History link on the Financial Aid - Federal Perkins Master Promissory Note (View MPN Information) page.	View Perkins MPN history.

Using Administrative Requests

This section provides an overview of administrative requests, known to the student as Request Counselor Action, and lists the page used to initiate and update administrative requests.

Understanding Administrative Requests

Administrative requests refer to any comment or request for action by students regarding their financial aid package. A request can be to increase the total aid package, replace loan awards with scholarships and grants, or cancel the financial aid application. A student can file a request for counselor action without taking any action toward accepting, reducing, or declining all or part of the financial aid package.

The Request Counselor Action link on the Financial Aid – Award Package page takes the student to the data entry page for the administrative request. The system displays the highest sequenced record. If there are no existing requests, or if the highest sequenced request exists with a status of *Closed,* the system creates a new request for the student. The Request Type defaults to *Change Request* with a status of *Open.* The student cannot change the status but can cancel or close the current request. The status remains open until either a counselor or the student closes the request. If a counselor closes the request, the counselor can enter the action taken. If a student closes the request, the system sets the action to *None.*

If there is an outstanding request with a status of *Open* or *Pending,* the system displays the current request to the student. The student can add comments or close the current request. The student can also view prior requests if there is more than one existing request.

Page Used for Administrative Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Financial Aid - Request Counselor Action	SS_FA_AWD_REQ	Click the Request Counselor Action link on the Financial Aid - Award Package page.	Request a change or meeting, or withdraw aid application. If a request is open, additional requests are appended to that existing request. If it is closed, additional requests are treated as new requests.

Viewing Student Self-Service Pages by Aid Year

This section provides an overview and lists the pages used to view student self service pages by aid year:

Understanding Viewing Self-Service Inquiry Pages by Aid Year

In the financial aid self-service inquiry pages, students can view their financial aid data by aid year or award period. If your institution enters *Aid Year* in the View Data By field on the Inquiry Options page, the system displays data based on the aid year.

The system displays all aid years for which the student has been aid-year activated on the Financial Aid - Select Aid Year to View page. If the estimated financial aid budget, expected family contribution, and total aid amounts for an aid year are all zero, the link for that year is disabled, and the system displays *No financial aid data available* instead of the aid year description. If the self service options for an aid year have not been set up, the link for that year is disabled, and the system displays *Aid Year not set up for self service.*

If the Allow Access check box is clear on the Self Service Options page, the system displays *No self service access for this aid year*. If the Inquiry Access check box is clear on the Packaging Status Summary page for this student, the system displays *Inquiry access denied.*

Students select the aid year to view. If a student has aid for more than one career in the aid year or award period, this link accesses the Financial Aid - Select Career to View page. If not, it accesses the Financial Aid - Award Summary page.

Note. If a student does not have awards or if the Award Detail check box on the Self Service Options page is clear, the system displays the Financial Aid - Self Service Links page.

See Also

Chapter 7, "Setting Up Financial Aid Self-Service," Understanding Campus Self Service for Financial Aid, page 67

Chapter 7, "Setting Up Financial Aid Self-Service," Defining Self-Service Options, page 68

Pages Used to View Student Self-Service Pages by Aid Year

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid - Select Aid Year to View	SS_FA_AWD_AY_SEL	Self Service, Campus Finances, View Financial Aid, Financial Aid – Select Aid Year to View	Select an aid year to view.
Financial Aid - Award Summary	SS_FA_AWD_SUMM_ALL	Click the Aid Year link on the Financial Aid - Select Aid Year to View page.	View a detailed summary of financial aid by aid year. This includes the type of award and the offered and accepted amounts for the aid year and terms within the aid year.
Financial Aid - Financial Aid Eligibility	SS_FA_AY_SUMMARY	Click the Financial Aid Eligibility link on the Financial Aid - Award Summary page.	View financial aid eligibility by aid year. This includes estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need. The title of this page and the name of the link leading to it are set in the Summary Link Label field on the Inquiry Options page (Set UP SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options).

Page Name	**Definition Name**	**Navigation**	**Usage**
Financial Aid - Estimated Financial Aid Budget	SS_FA_COA	Click the Estimated Financial Aid Budget amount link on the Financial Aid - Financial Aid Eligibility page.	View estimated financial aid budget by aid year.
Financial Aid - Expected Family Contribution	SS_FA_EFC_SUMMARY	Click the Expected Family Contribution amount link on the Financial Aid - Financial Aid Eligibility page.	View expected family contribution by aid year for both parent and student.
Financial Aid - Select Career to View	SS_FA_AY_CAR_SEL	Click the Total Aid amount link on the Financial Aid - Financial Aid Eligibility page.	Select a career to view by aid year.
Financial Aid - Loan Application Information	SS_FA_LOAN_DETAIL	Click the Loan Application Information link on the Financial Aid - Award Summary page.	View loan application information. This includes loan status, loan amount, loan fee, net amount, and activity date. A student must have an originated loan in the system for this information to be available.
Financial Aid - Declined Awards	SS_FA_AWD_ALL_CD	Click the View Declined Awards link on the Financial Aid - Award Summary page.	View declined awards by aid year. This view is available if your institution entered *Aid Year* in the *View Summary By* field on the Self Service Options page.
Financial Aid - Canceled Awards	SS_FA_AWD_ALL_CD	Click the View Canceled Awards link on the Financial Aid - Award Summary page.	View canceled awards by aid year. This view is available if your institution entered *Aid Year* in the *View Summary By* field on the Self Service Options page.
Financial Aid - Scheduled Disbursements	SS_FA_AWD_TERM_DTL	Click the View Scheduled Disbursement Dates link for the term in the scroll area on the Financial Aid - Award Summary page.	View scheduled disbursements by term. This includes the type of award, the accepted amount, the fee, the net amount, and the scheduled disbursement dates for a particular term. The system displays awards that have been offered but not accepted by the student with a blank disbursement date.

Viewing Student Self-Service Pages by Award Period

This section lists the pages used to view student self-service pages by award period. Most pages are the same for both aid year and award period options.

If your institution enters *Award Period* in the View Data By field on the Inquiry Options page, the system displays the data by award period.

Pages Used to View Student Self-Service Pages by Award Period

Page Name	***Definition Name***	***Navigation***	***Usage***
Financial Aid - Select Aid Year to View	SS_FA_AWD_AY_SEL	Self Service, Campus Finances, View Financial Aid, Financial Aid - Select Aid Year to View	Select an award period to view.
Financial Aid - Award Summary	SS_FA_AWD_SUMM_PER	Click the link on the Financial Aid - Select Aid Year to View page designating the aid year that you want to view.	View a detailed summary of financial aid by award period. This includes the type of award and the offered and accepted amounts for the academic year and terms within the award period.
Financial Aid - Financial Aid Eligibility	SS_FA_AP_SUMMARY	Click the Financial Aid Eligibility link on the Financial Aid - Award Summary page.	View financial aid eligibility by award period. This includes estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need.
Financial Aid - Estimated Financial Aid Budget	SS_FA_COA	Click the Estimated Financial Aid Budget amount link on the Financial Aid - Financial Aid Eligibility page.	View estimated financial aid budget by award period.
Financial Aid - Expected Family Contribution	SS_FA_EFC_BY_AP	Click the Expected Family Contribution amount link on the Financial Aid - Financial Aid Eligibility page.	View expected family contribution by award period. This includes both parent and student.
Financial Aid - Select Career to View	SS_FA_AP_CAR_SEL	Click the Total Aid amount link on the Financial Aid - Award Summary page.	Select a career to view by award period.

Page Name	***Definition Name***	***Navigation***	***Usage***
Financial Aid - Loan Application Information	SS_FA_LOAN_DETAIL	Click the Loan Application Information link on the Financial Aid - Award Summary page.	View loan application information. This includes loan status, loan amount, loan fee, net amount, and activity date. A student must have an originated loan in the system for this information to be available.
Financial Aid - Declined Awards	SS_FA_AWD_PER_CD	Click the View Declined Awards link on the Financial Aid - Award Summary page.	View declined awards. This view is available to the student if the institution entered *Award Period* in the View Summary By field on the Self Service Options page.
Financial Aid - Canceled Awards	SS_FA_AWD_PER_CD	Click the View Canceled Awards link on the Financial Aid - Award Summary page.	View canceled awards. This view is available to the student if the institution entered *Award Period* in the View Summary By field on the Self Service Options page.
Financial Aid - Scheduled Disbursements	SS_FA_AWD_TERM_DTL	Click the link for the term in the scroll area on the Financial Aid - Award Summary page.	View scheduled disbursements by term. This includes the type of award, the accepted amount, the fee, the net amount, and the scheduled disbursement dates for a particular term.

Chapter 19

Using Self-Service Campus Personal Information

This chapter provides an overview of PeopleSoft Enterprise Campus Self-Service personal information and discusses how to:

- Display and access self-service personal data.
- Use self-service user preferences.
- Use self-service addresses, names, phones, and demographic data.
- Use self-service personal attributes data.
- Use self-service identification data.
- Use self-service participation data.
- Enter other self-service biographical data.
- Use self-service service indicators data.
- Use self-service checklists data.

Understanding PeopleSoft Campus Self-Service Personal Information

The personal information functionality of PeopleSoft Campus Self-Service exposes familiar PeopleSoft Campus Community information to self-service users. It provides an easy way for self-service users to update basic personal information about themselves at any time without having to visit your offices or complete and mail a hardcopy form.

All authenticated roles can use self-service functionality. They can use it to maintain their own personal information. They can also use it to review the holds and to do items on record at your institution for themselves.

Note. For security reasons, the following data is view-only for self-service users: national identification number, citizenship, driver's license, visa or permit data, veteran status, gender, birth date, marital status, extracurricular activities, and internal honors and awards.

The navigation tabs that are used in self-service personal information are defined on the Navigation Tabs Setup page.

See Also

Chapter 3, "Setting Up Self-Service Navigation," page 9

Displaying and Accessing Self-Service Personal Data

The Personal Data Summary page contains links to self-service pages showing the individual's personal data. Optionally, you can also set the summary page to display the person's contact information and lists of holds and to do's for the student's convenient viewing and for any staff viewing data for that individual.

You can enter the label to use as the link for redirecting the user to the self-service page where the displayed address, phone number, or email address can be edited or updated. You can also set how many negative service indicators (holds) to display and how many pending checklist items (to do's) to display on the summary page.

This section describes how to:

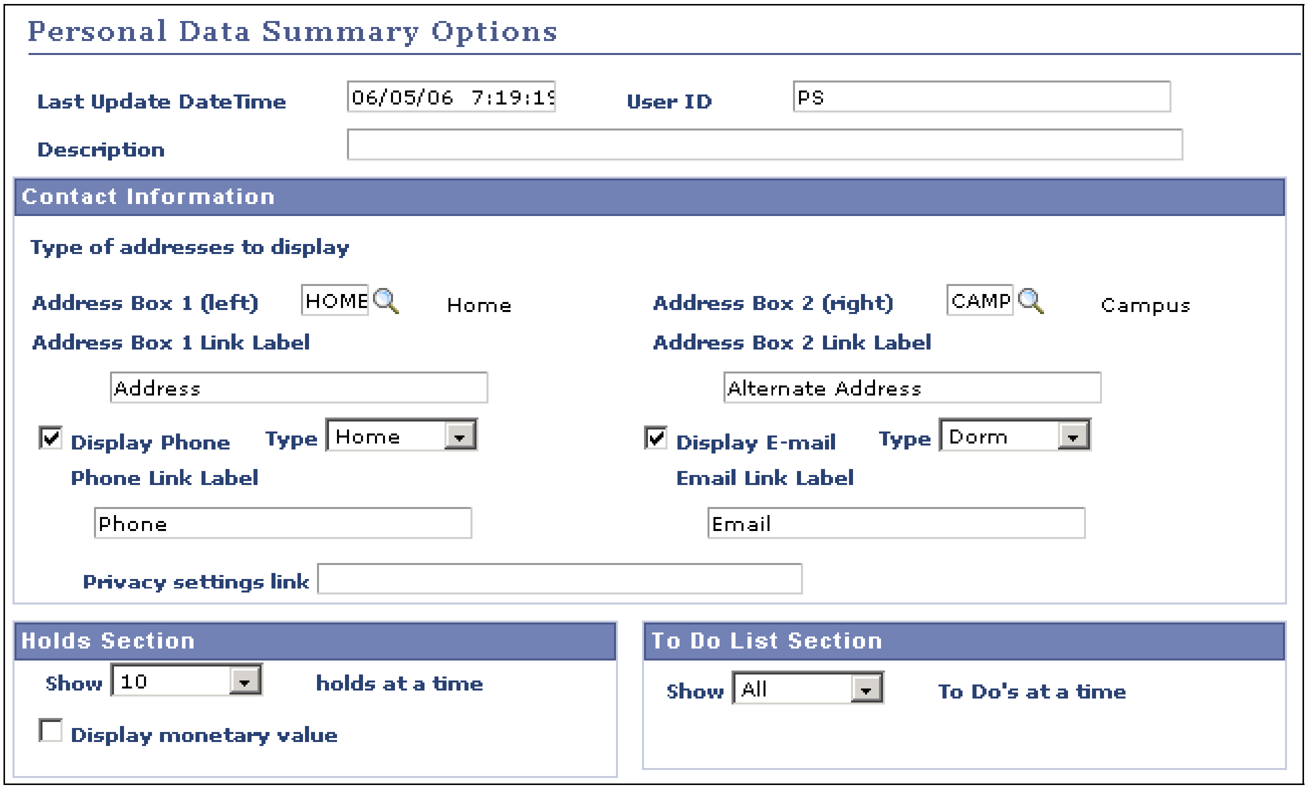
- Set data to display on the Personal Data Summary page.
- Access personal data.

Pages Used to Display and Access Self-Service Personal Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Personal Data Summary Options	SSS_PRSN_SUM_SETUP	Setup SACR, Common Definitions, Self Service, Personal Data Summary Options	Optionally, set the types of addresses, phone number, and email address and the number of holds and to do's to display for an ID on the Personal Data Summary page.
Personal Data Summary	SSS_PRSNLDATA_SUMM	Self Service, Campus Personal Information, Personal Data Summary	View a summary of links to your personal data, and view a list of your holds and to do's.

Setting Data to Display on the Personal Data Summary Page

Access the Personal Data Summary Options page (Setup SACR, Common Definitions, Self Service, Personal Data Summary Options).



Personal Data Summary Options page

The Personal Data Summary Options page contains links to self-service pages that show the individual's personal data. You can optionally set the individual's contact information and holds and to do's to display on the summary page.

Contact Information

You can select the type of contact information to display and enter the label to use as the link for redirecting the user to the self-service page where the address, phone number, or email address can be edited or updated.

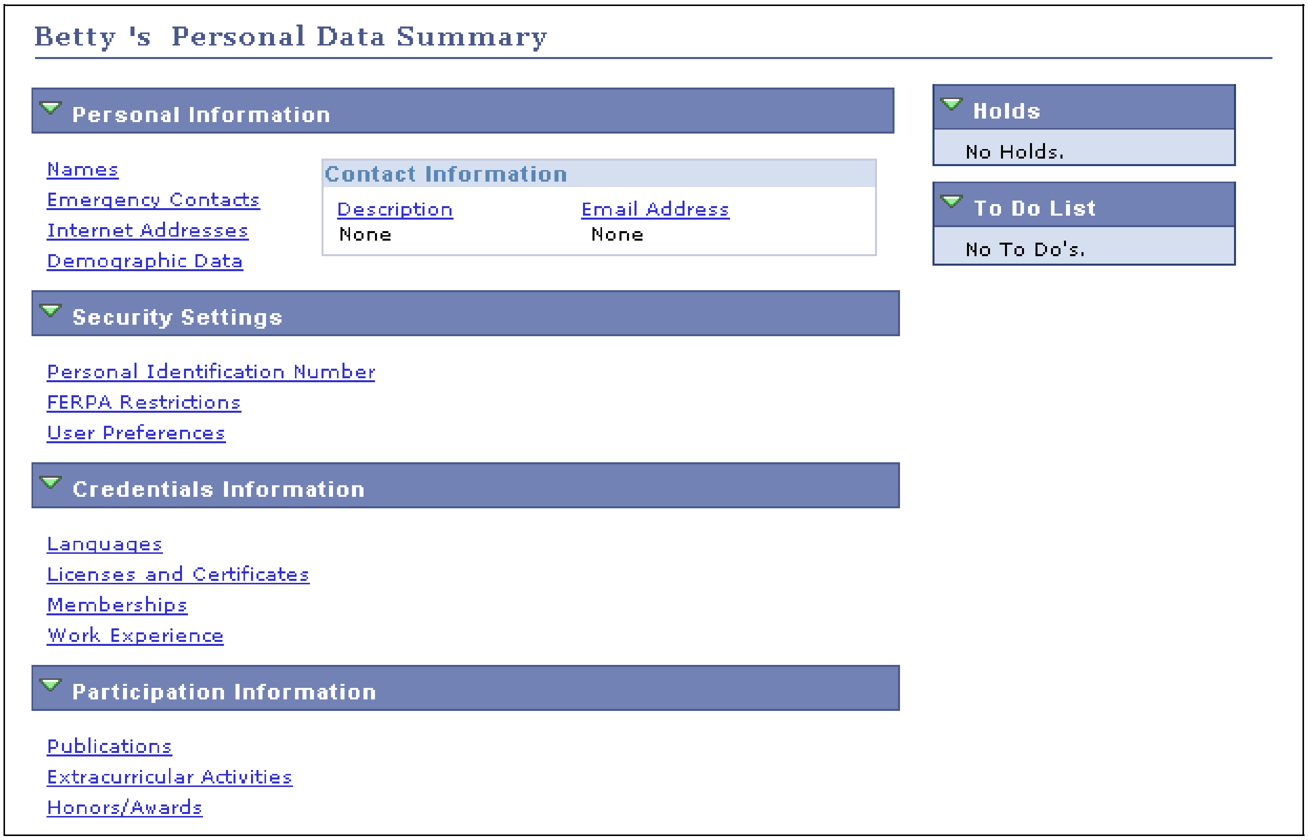
If you do not use the U.S. Family Educational Rights and Privacy Act (FERPA) functionality, you can enter the URL to your institution's privacy site in the Privacy settings link field.

Holds and To Do List Sections

You can also specify how many negative service indicators (holds) and pending checklist items (to do's) to display for the person.

Accessing Personal Data

Access the Personal Data Summary page (Self Service, Campus Personal Information, Personal Data Summary).



Personal Data Summary page

Options set on the Personal Data Summary Options page render the Contact Information,Holds, and To Dos data on the Personal Data Summary page. If the individual had negative service indicators assigned or any pending checklists, the page would (according to the sample options page) also list the first 10 holds (service indicators) and all of the individual's pending checklist items.

Using Self-Service User Preferences

User preferences enable self-service users to set default values for themselves to minimize the need for repetitive data entry. After they have been set, the default values remain associated with the user until changed or deleted. Self-service users can select their own user preferences or you can do it for them by using the User Profiles Management process to assign them the latest values corresponding to their profiles.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Creating and Maintaining User Profiles"

Page Used for Self-Service User Preferences

Page Name	***Definition Name***	***Navigation***	***Usage***
User Preferences	SS_CC_USER_PREF	• Select the User Preferences link on the Personal Data Summary page • Self Service, Campus Personal Information, User Preferences	Enter default values for academic value and other elements required often by the system.

Using Self-Service Addresses, Names, Phones, and Demographic Data

Self-service users can view and update their own addresses, names, phone numbers, and demographic data, including gender, date of birth, and marital status.

Addresses, names, phones, and demographic data are set up in the PeopleSoft Enterprise Campus Solutions system. When you set up Personal Data Summary Options for PeopleSoft Campus Self Service, you can choose which address, phone, and email type to display by default on self-service pages. No additional setup is required.

Links under Campus Personal Information enable online self-service users to view, modify, or update their own:

- Addresses
- Names
- Phone numbers
- Email addresses
- Internet addresses
- Emergency contacts
- Demographic information, including gender, date and place of birth, marital status, and so on.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community"

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Biographical Information," Setting Up Names, Addresses, and Phone Numbers

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Biographical Information," Setting Up Emergency Contacts Data

Pages Used for Self-Service Addresses, Names, Phones, and Demographic Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Addresses	SS_ADDRESSES	• Click the address link on the Personal Data Summary page. An address link is either or both of the labels entered for the Address Box 1 and Address Box 2 on the Personal Data Summary Options page • Self Service, Campus Personal Information, Addresses, Addresses	View your current address types as permitted by the Type Control page, and the associated address data.
Edit Address	EO_ADDR_USA_SEC	• Click the edit button on the Addresses page. • Click the ADD A NEW ADDRESS button on the Addresses page. • Click the Edit Address link on the Emergency Contact Detail page .	When you access this page using the edit button on the Addresses page or the Edit Address link on the Emergency Contact Detail page, you can edit or update the address. When you access this page using the ADD A NEW ADDRESS button, you can add an address type and associated data for yourself to be effective now or on a future date.
Delete Address	SS_UPDATE_ADDRESS	Click the Delete (type) address link on the Addresses page. (Self-service users can edit only the home and mailing addresses, so no Delete button appears for these address types.)	Delete an address type and associated data.
Names	SS_CC_NAME	• Click the Names link on the Personal Data Summary page. • Self Service, Campus Personal Information, Names, Names	View your current name types as permitted by the Type Control page, and the associated name data.

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Name Add a new name	SS_CC_UPDATE_NAME	• Click theedit button on the Names page to access the Change Name page. • Click the ADD A NEW NAME button on the Names page to access the Add a new name page.	When accessed from the edit button, you can view or update the name type. When accessed from the ADD A NEW NAME button, you can add a name type and new name with a current for future effective date.
Phone Numbers	SS_CC_PERS_PHONE	• Click the Contact Information Description link on the Personal Data Summary page. • Click the ADD A PHONE NUMBER button on the Emergency Contact Detail page, and then select the phone type to edit or delete. • Self Service, Campus Personal Information, Phone Numbers	View and update your current phone types as permitted by the Type Control page, and phone numbers. Buttons on this page also enable you to add or delete rows to add or delete phone numbers.
Email Addresses	SS_CC_EMAIL_ADDR	• Click the Contact Information Email Address link on the Personal Data Summary page. • Self Service, Campus Personal Information, Email Addresses	View and update your current email address types as permitted on the Type Control page, and email addresses. Buttons on this page also enable you to add or delete rows to add or delete email addresses.
Internet Addresses	SS_CC_INTERNET_ADR	• Click the Internet Addresses link on the Personal Data Summary page. • Self Service, Campus Personal Information, Internet Addresses	View and update internet addresses, including website and FTP site addresses. Buttons on this page also enable you to add or delete rows and to add or delete internet addresses.

Page Name	**Definition Name**	**Navigation**	**Usage**
Emergency Contacts	SS_CC_EMRG_CNTCT_L	• Click the Emergency Contacts link on the Personal Data Summary page. • Self Service, Campus Personal Information, Emergency Contacts	View the name, address, and phone numbers for your emergency contact.
Emergency Contact Detail	SS_CC_EMRG_CNTCT_D	Click the ADD AN EMERGENCY CONTACT button on the Emergency Contact page.	Add an emergency contact for yourself, and enter the contact information.
Demographic Information	SS_CC_DEMOG_DATA	• Click the Demographic Data link on the Personal Data Summary page. • Self Service, Campus Personal Information, Demographic Information	View a summary of your demographic data such as your date of birth, gender, marital status, national ID, and so on. **Note.** If a photo is loaded into the system from the Photograph page in PeopleSoft Enterprise Campus Solutions, that photo appears in the upper right on this page. See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Managing Personal Identification Data," Entering Photographs.
FERPA Restrictions	SS_CC_FERPA_INQ	• Click the FERPA Restrictions link on the Personal Data Summary page. • Self Service, Campus Personal Information, FERPA Restrictions	View data that you have restricted from being released.
Edit FERPA/Directory Restrictions	SS_CC_FERPA	Click the EDIT FERPA DIRECTORY RESTRICTIONS button on the FERPA Restrictions page.	Place restrictions to prevent the release of data about yourself.

Page Name	*Definition Name*	*Navigation*	*Usage*
Release To Publication	INST_PUB_CATG_SEC2	Click the Release To Publication link on the Edit FERPA/Directory Restrictions page. (The link appears only when the Restrict check box is selected.)	Release restricted information for inclusion in specific internal directory publications.

Using Self-Service Personal Attributes Data

Self-service users can view and update the list of languages that they read, write, and speak.

Languages are set up in PeopleSoft Enterprise Campus Solutions. No additional setup is required for self-service.

Note. Religious preference and decedent data personal attributes are not available from Campus Self Service. These are set up and maintained in PeopleSoft Enterprise Campus Solutions only.

This section lists the pages used for self-service personal attributes.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Biographical Information," Setting Up Personal Attributes

Pages Used for Self-Service Personal Attributes

Page Name	*Definition Name*	*Navigation*	*Usage*
Languages	SS_CC_LANGUAGES_L	• Click the Languages link on the Personal Data Summary page. • Self Service, Campus Personal Information, Languages	View or edit a list of the languages that you read, write, or speak and the proficiency with which you read, write, or speak them.

Page Name	*Definition Name*	*Navigation*	*Usage*
Language Detail	SS_CC_LANGUAGES_D	• Click the name of the language on the Languages page to access a view-only version of the Language Detail page. • Click the edit button on the Languages page to access an updatable version of the Language Detail page. • Click theADD A LANGUAGE button on the Languages page to access and enterable version of the Language Detail page.	When you access this page from the name of the language, view details of that language and your proficiency. When you access this page using the edit button, view and modify details of that language and your proficiency. When you access this page using the ADD A LANGUAGE button, add a language to your list of languages.
Ethnicity	SS_CC_ETHNICITY_US	• Self Service, Student Center, Demographic Data link, Ethnicity • Self Service, Faculty Center, View Personal Data Summary link, Demographic Data link, Ethnicity tab • Self Service, Campus Personal Information, Personal Data Summary link, Demographic Data link, Ethnicity tab	Students, staff, and faculty identify their ethnicity and enter details about their racial background.
Self Service Help	SS_CC_ETH_HELP_PG	Click the Explain link on the Ethnicity page.	Students, staff, and faculty review ethnicity definitions from the National Center for Education Statistics (NCES) website.

Entering Ethnicity Data

The appearance of this page changes, based on the settings defined on the Self Service Ethnicity Setup page. If the page is set up as display only, students and faculty are only able to see their ethnicity data on file in the system; they cannot add or update it through Campus Self Service.

Ethnicity questions are asked in two parts. First, self-service users may indicate whether they are or are not of Hispanic or Latino origin. Second, users may indicate their race. Users can click the Explain link to access the Self Service Help page that describes the way to answer the two questions, based on information from the NCES website: http://nces.ed.gov/statprog/2002/std1_5.asp

When a self-service user answers Question 1, the system inserts a value matching the Self Service Ethnicity Setup Answer Mapping for the respective answer into the Ethnicity records. When a self service user answers Question 2, the system inserts values matching the Self Service Ethnicity Setup Answer Mapping for the respective answers into the Ethnicity records. For example, if the user selects Asian and 'Asian' is the ethnic group mapped to that answer on the Self Service Ethnicity Setup Answer, a row for Asian will be inserted into the ethnicity tables.

The Background Information grid only appears if you have set it up in the Additional Background Information section of the Self Service Ethnicity Setup page.

When collecting additional background information, the values that you selected in the Answer Mapping section of the Self Service Ethnicity Setup do not appear in the Background prompt. The values that do appear have been selected in the Ethnic Groups to Display on the Self Service Ethnicity Group page and match the self-service user's answers to the questions. For example, when the user selects 'Yes, I am Hispanic or Latino' and also selects the American Indian or Alaska Native check box, only those active, current ethnic groups selected in Ethnic Groups to Display on the Self Service Ethnicity Setup that map to Hispanic or American Indian EEO Ethnic Groups will display in the Background prompt.

If the user answers 'No, I am not Hispanic' and does not answer the second question, the Background prompt displays all non-Hispanic ethnic groups selected in Ethnic Groups to Display on the Self Service Ethnicity Setup page. If the user then selects a Background value that maps to one of the five answers to Question 2, the related check box will be set when the Submit button is selected. Finally, users must click the The Information is correct as entered check box to confirm their selections and Submit their information. Even if users choose not to answer the questions, they will be prompted to select The Information correct as entered to indicate that they have reviewed the survey questions.

The IPEDS Ethnicity survey questions are optional. If a self-service user does not wish to divulge the information, they may simply leave the questions unanswered and select the The Information is correct as entered check box then select Submit.

A detailed technical red paper, including data examples, is available on Oracle's My Oracle Support website.

See Also

"Campus Solutions IPEDS and Ethnicity Red Paper," posted to My Oracle Support in June 2009.

Using Self-Service Identification Data

Self-service users can enter and change their own personal identification numbers from within Campus Self Service. No specific setup is required.

Note. For security reasons, other identification data is either not available from Campus Self Service (external system ID and residency data) or is used as display-only (visa and passport data, driver's license information, or photos) These are set up and maintained in PeopleSoft Enterprise Campus Solutions only.

This section lists the page used for self-service identification data.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Personal Identification Data."

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Managing Personal Identification Data."

Page Used for Self-Service Identification Data

Page Name	Definition Name	Navigation	Usage
Personal Identification Number	SS_CC_PIN	• Click the Personal Identification Number link on the Personal Data Summary page. • Self Service, Campus Personal Information, Personal Identification Number	Create a personal identification number for yourself.

Using Self-Service Participation Data

Self-service users can view and update lists of their own licenses and certificates, memberships, and publications from within Campus Self Service. In addition, individuals can view lists of their own extracurricular activities and honors and awards.

Participation data is set up in the PeopleSoft Enterprise Campus Solutions system. No additional setup is required for self-service.

Note. Athletic participation is not available from Campus Self Service. You set up and maintain athletic participation data in PeopleSoft Enterprise Campus Solutions only.

This section lists the pages used for self-service participation data.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Managing Participation Data"

Pages Used for Self-Service Participation Data

Page Name	***Definition Name***	***Navigation***	***Usage***
License and Certificates	SS_CC_LIC_CERT_L	• Click the Licenses/Certificates link on the Personal Data Summary page. • Self Service, Campus Personal Information, Licenses and Certificates	View a list of your licenses and certificates.
License/Certificate Detail	SS_CC_LIC_CERT_D	• Click the name of the license or certificate on the License and Certificates page to access a view-only version of the License/Certificate Detail page. • Click the edit button on the License and Certificates page to access an updatable version of the License/Certificate Detail page. • Click the ADD A LICENSE/CERTIFICATE button on the Licenses and Certificates page to access an enterable version of the License/Certificate Detail page.	When you access this page from the name of the license or certificate, view details about that license or certificate. When you access this page using the edit button, view or modify details about that license or certificate. When you access this page using the ADD A LICENSE/CERTIFICATE button, add another license or certificate to your list of licenses and certificates.
Memberships	SS_CC_MEMBER_L	• Click the Memberships link on the Personal Data Summary page. • Self Service, Campus Personal Information, Memberships	View a list of your memberships.

Page Name	**Definition Name**	**Navigation**	**Usage**
Membership Detail	SS_CC_MEMBER_D	• Click the name of the membership on the Memberships page to access a view-only version of the Membership Detail page. • Click the edit button on the Memberships page to access an updatable version of the Membership Detail page. • Click the ADD A MEMBERSHIP button on the Memberships page to access an enterable version of the Membership Detail page.	When you access this from the name of the membership, view details about that membership. When you access this page using the edit button, view or modify details about that membership. When you access this page using the ADD A MEMBERSHIP button, add another membership to your list of memberships.
Extracurricular Activities	SS_CC_EXTRACUR_ACT	• Click the Extracurricular Activities link on the Personal Data Summary page. • Self Service, Campus Personal Information, Extracurricular Activities	View a list of your extracurricular activities. **Note.** Self-service users can view extracurricular activities information, but they cannot enter, modify, or update it.
Honors and Awards	SS_CC_HONOR_AWARD	• Click the Honors/Awards link on the Personal Data Summary page. • Self Service, Campus Personal Information, Honors and Awards, Academic Honors and Awards	View a list of your academic honors and awards. **Note.** Self service users can view academic honors and awards information, but they cannot enter, modify, or update it.
Publications	SS_CC_PUB_L	• Click the Publications link on the Personal Data Summary page. • Self Service, Campus Personal Information, Publications	View a list of your publications.

Page Name	Definition Name	Navigation	Usage
Publication Detail	SS_CC_PUB_D	• Click the name of the publication on the Publications page to access a view-only version of the Membership Detail page. • Click the edit button on the Publications page to access an editable version of the Membership Detail page. • Click the ADD PUBLICATION button on the Publications page to access an enterable version of the Membership Detail page.	When you access this page from the name of the publication, view details of that publication. When you access this page using the edit button, view and modify details of that publication. When you access this page using the ADD PUBLICATION button, add a publication to your list of publications.

Entering Other Self-Service Biographical Data

You can also use Campus Community self service to enable students to manage other biographical data.

This section lists the pages used to enter other self-service biological data.

Pages Used to Enter Other Self-Service Biographical Data

Page Name	Definition Name	Navigation	Usage
Work Experience	SS_CC_WORK_EXP_A	• Click the Work Experience link on the Personal Data Summary page . • Self Service, Campus Personal Information, Work Experience	View a list of your work experience.

Page Name	Definition Name	Navigation	Usage
Employment Details	SS_CC_WORK_EXP	• Click the name of the work experience on the Work Experience page to access a view-only version of the Employment Details page. • Click the edit button on the Work Experience page to access an updatable version of the Employment Detail page. • Click the ADD A WORK EXPERIENCE button on the Work Experience page to access an enterable version of the Employment Details page.	When you access this page from the name of the work experience, view details of that work experience. When you access this page using the edit button, view and modify details of that work experience. When you access this page using the ADD A WORK EXPERIENCE button, add a work experience to your list of work experiences

Using Self-Service Service Indicators Data

Self-service service indicators are presented in Campus Self Service as holds.

The Holds link under Campus Personal Information enables self-service users to assume responsibility for viewing and resolving their own negative service indicator issues.

Note. Positive service indicators are not presented from Campus Self Service. Positive service indicators are set up and applied in PeopleSoft Enterprise Campus Solutions only.

Service indicators are set up in PeopleSoft Enterprise Campus Solutions. When you define a service indicator in Campus Solutions, you can choose whether to display the indicator (as a hold) on self service pages for all IDs to which the indicator is assigned. When you set up Personal Data Summary Options for Campus Self Service, you can choose how many holds to display and whether to display their monetary value, if any. No other setup is required.

This section lists the pages used for self-service service indicators data.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Service Indicators"

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Managing Service Indicators"

Pages Used for Self-Service Service Indicators Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Your Holds	SS_CC_HOLDS	Self Service, Campus Personal Information, Holds	View holds placed on services for yourself and determine how and when to resolve them.
Hold Item	SS_CC_HOLD_SEC	• Click the name of the hold item in the Holds box on the Personal Data Summary page • Click the name of the hold item on the Your Holds page.	View information about a specific hold and determine how to resolve it and whom to contact

Using Self-Service Checklists Data

Checklists data is presented as a to-do item list in Campus Self Service.

The To Do List link under Campus Personal Information enables self-service users to assume responsibility for viewing and resolving their own pending checklist items.

Checklists are set up in PeopleSoft Enterprise Campus Solutions. When you set up Personal Data Summary Options for Campus Self Service, you can choose how many to-do items to display. No additional setup is required for self service.

This section lists the pages used for self-service checklists data.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Checklists"

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Managing Checklists"

Pages Used for Self-Service Checklists Data

Page Name	***Definition Name***	***Navigation***	***Usage***
To Do List	SS_CC_TODOS	Self Service, Campus Personal Information, To Do List	View your pending checklist items and determine what to do to satisfy the requirements.

Page Name	***Definition Name***	***Navigation***	***Usage***
To Do Item	SS_CC_TODOS_SEC	• Click the name of the To Do item in the To Do List box on the Personal Data Summary page • Click the name of the To Do Item on the To Do List page.	View information about a specific checklist item and determine what is required and whom to contact.

Chapter 20

Using Self-Service Transfer Credit

This chapter discusses how to:

- View transfer credit reports through self-service pages.
- Evaluate transfer credit through self-service pages.

Viewing Transfer Credit Reports Through Self-Service Pages

Students can view transfer credit reports through pages in Campus Self Service.

Page Used to View Transfer Credit Reports Through Self-Service Pages

Page Name	*Definition Name*	*Navigation*	*Usage*
View Transfer Credit Report	SS_TRCR_RPT	Self Service, Transfer Credit	Students can view all of their course, test, and other transfer credit that your academic institution has submitted for posting to their student enrollment records.

Evaluating Transfer Credit Through Self-Service Pages

This section provides an overview of the Self-Service Modeling Transfer Credit feature and discusses how students, applicants, prospects, and visitors can use this feature.

Understanding the Self-Service Modeling Transfer Credit Feature

The Self-Service Modeling Transfer Credit feature enables users to enter and process "what-if" course transfer credit evaluations over the internet. Students, applicants, prospects, and visitors can use the Evaluate Transfer Credit self-service pages to create course transfer credit models based on transfer courses from external organizations or from internal academic careers and programs. These individuals can then process their transfer credit models, view their transfer credit evaluation summaries, and use the evaluation results to run what-if degree progress reports.

Within the what-if model, users can run a degree progress analysis that also includes all courses on the individual's record that are in a "completed" or "posted" transfer model. This way, for prospects and applicants with completed (but not posted) transfer models on file, the system automatically articulates and includes these courses in the what-if degree audit.

Users have access to the self-service Modeling Transfer Credit feature based on their role. Visitors—individuals who have not formally applied to your institution—can access the Evaluate Transfer Credit self-service pages once the visitor has been assigned an ID. Prospects, applicants, and students can also access the Evaluate Transfer Credit self-service pages.

The Self-Service Modeling Transfer Credit feature stores the data it creates in its own tables separate from the tables the Student Records feature uses. This separation ensures the data integrity of official transfer credit records. However, the page elements of the self-service feature prompt against the setup tables of the Student Records Transfer Credit feature, making the setup for the Transfer Credit feature a prerequisite for the self-service feature. Before a user can evaluate transfer credit scenarios, you must define academic institutions, careers, programs, terms, courses, course transfer equivalency rules, and academic program and source equivalencies.

Because the course transfer rules associated with an external organization or internal academic institution are based on effective dates and grade points, the articulation term, external term, external year, unit, and grading information that individuals enter into their models is critical. The self-service pages have onscreen instructions that guide individuals through these data entry requirements so that they can receive accurate information.

Note. Transfer model self-service reports always include both posted and completed transfer models, regardless of the Incl Completed Transfer Models check box setting on the Transcript Type–Basic Data page.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Setting Up Transfer Credit Processing"

Prerequisites

Before individuals can process self-service transfer credit modelling, you must:

- Set up your system for academic advising.

  See *PeopleSoft Enterprise Academic Advisement 9.0 PeopleBook*, "Getting Started with Academic Advisement," Academic Advisement Overview.

- Define a transcript type that is available for self-service processing.

  See *PeopleSoft Enterprise Student Records 9.0 PeopleBook*, "Setting Up Transcripts," Defining Transcript Type Basic Data.

Pages Used to Evaluate Transfer Credit Through Self-Service Pages

Page Name	***Definition Name***	***Navigation***	***Usage***
Evaluate My Transfer Credit	SS_TRCR_SRCH	Self Service, Transfer Credit	Individuals can use this page to edit or delete an existing course transfer credit model that they have previously created, or begin creating a new model.
Transfer Credit Model Information	SS_TRCR_TARGET	• Self Service, Transfer Credit • Click the Create New Model button on the Evaluate My Transfer Credit page.	Individuals can use this page to select the required target information for their course transfer credit model. Target information includes the academic career, program, and plan to which they want to apply the course transfer credit, and the articulation term. To assist individuals in entering this information, the page elements prompt against the academic institution, academic career, academic program, academic plan and term tables. The term that the individual entered determines which values appear in the Program and Plan fields based on the Last Admit Term on the Academic Program and Academic Plan pages. If the individual is a current student, the system displays all active programs and plans.
Transfer Credit Source Information	SS_TRCR_SOURCE	• Self Service, Transfer Credit • Click the Next button on the Transfer Credit Model Information page.	Individuals can use this page to enter the external organization or internal academic institution from which the individual is transferring. To assist individuals in entering this information, the page elements prompt against the course transfer rules tables to ensure that you institution has established a course transfer rule for the external organization or internal academic institution.

Page Name	Definition Name	Navigation	Usage
Current Coursework	SS_TRCR_INTCR	• Self Service, Transfer Credit • Select a source career and institution and click the Next button on the Transfer Credit Source Information page.	Individuals who are creating internal course transfer credit models can use this page to view their coursework for at the specified internal academic institution. The system automatically loads their enrollment information into the page.
Education Data	SS_TRCR_EDUC	• Self Service, Transfer Credit • Select an external institution and click the Next button on the Transfer Credit Source Information page.	Individuals who are creating external course transfer credit models can use this page to enter their external education information. This information includes the external year and term, term type, external subject area, course number, units taken, and grade received. The system does not uses the education data table to retrieve and store this information. The system instead requires the individual to enter the information, which it then stores on a set of tables unique to the Self-Service Modeling Transfer Credit feature.
Transfer Credit Results	SS_TRCR_RSLT	• Self Service, Transfer Credit • Click the Submit button on the Education Data page or on the Current Coursework page.	Individuals can use this page to view the results of the Self-Service Transfer Credit Evaluation process for the model. The system displays the transfer credit summary report in a grid at the bottom of the page. Individuals can use the browser print function to print the page. Individuals can click the View Details button to see additional information about the incoming courses and their internal equivalents. The evaluation is tentative pending final review by your academic institution.

Page Name	***Definition Name***	***Navigation***	***Usage***
Transfer Credit Results Detail	SS_TRCR_RSLT_DTL	• Self Service, Transfer Credit • Click the View Transfer Equivalency Details button on the Transfer Credit Results page.	Individuals can use this page to view incoming course and internal equivalent information. The system displays each incoming course beside its internal equivalent course. The system captures but hides the valid attempts, earn credit, and include in GPA fields.
Process A Degree Progress Report	SS_TRCR_AA_RQST	• Self Service, Transfer Credit • Click the Next button on the Transfer Credit Results page.	Individuals can use this page to run a degree progress audit report to see how the internal equivalents of their transfer credit model apply towards their degree requirements. The report process combines PeopleSoft Academic Advisement what-if and course list what-if functionality. In PeopleSoft Academic Advisement, you can apply degree requirements to students based on their academic career, program, plan, and subplan. A what-if scenario enables you to select this academic structure information and run a process to see what requirements a student needs for graduation.

Page Name	***Definition Name***	***Navigation***	***Usage***
Modeling Transfer Credit - View Degree Progress Report	SS_TRCR_AA_RSLT	• Self Service, Transfer Credit • Click the Next button on the Process A Degree Progress Report page.	Individuals can use this page to view the what-if degree progress report, showing them their possible degree progress based on the transfer credit model. For visitors, the process uses the target academic program and internal equivalent courses, which become the what-if courses, during the creation of the degree progress report. For applicants and students, the process uses the target academic program and internal equivalent courses of the model, completed and posted transfer credit models, and enrollment records during the creation of the degree progress report.

Chapter 21

Using Self-Service Student Recruiting

The chapter discusses how to use self service student recruiting.

Using Self-Service Student Recruiting for Recruiting and Admissions

Recruiting officers use Student Recruiting to view prospect and applicant information through pages in Campus Self Service. They can view the prospects and applicants who are assigned to them by category and region. They can also view prospects and applicants for a specific organization.

This section lists prerequisites and lists the pages used for self-service student recruiting.

Prerequisites

Before recruiting officers can view prospects and applicants through self-service pages, they must have prospects and applicants who are assigned to them. Assign a recruiter to a prospect on the Prospect School/Recruiting page or through the Process Recruiters pages. Assign a recruiter to an applicant on the Application School/Recruiting page.

Pages Used for Self-Service Student Recruiting for Recruiting and Admissions

Page Name	Definition Name	Navigation	Usage
Prospects by Category - Select Search Criteria	SS_ADM_PRS_REQ_CAT	Self Service, Student Recruiting, View Prospects by Category	Recruiting officers use this page to search for prospects by category.
Prospects by Category - Search Results	SS_ADM_PRS_SUM_CAT	Click the Search button on the Prospects by Category - Select Search Criteria page.	Recruiting officers use this page to view prospect search results.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Program Detail link on any of the prospect search results pages.	Recruiting officers use this page to view program details for a prospect.

Page Name	***Definition Name***	***Navigation***	***Usage***
Prospects by Organization - Select Search Criteria	SS_ADM_PRS_REQ_ORG	Self Service, Student Recruiting, View Prospects by Organization	Recruiting officers use this page to search for prospects by organization.
Prospects by Organization - Search Results	SS_ADM_PRS_SUM_ORG	Click the Search button on the Prospects by Organization - Select Search Criteria page.	Recruiting officers use this page to view prospect search results.
Organization Primary Location	EXT_ORG_LOC	Click the Org Primary Location link on the Prospects by Organization - Search Results page.	Recruiting officers use this page to view the organization's primary address.
Prospects by Region - Select Search Criteria	SS_ADM_PRS_REQ_REG	• Outreach, Recruiting Officer, Home, Recruiting, By Region • Self Service, Student Recruiting, View Prospects By Region	Recruiting officers use this page to search for prospects by region.
Prospects by Region - Search Results	SS_ADM_PRS_SUM_REG	Click the Search button on the Prospects by Region - Select Search Criteria page.	Recruiting officers use this page to view prospect search results.
Applicants by Category - Select Search Criteria	SS_ADM_APP_REQ_CAT	• Outreach, Recruiting Officer, Home, Recruiting, By Category • Self Service, Student Recruiting, View Applicants By Category	Recruiting officers use this page to search for applicants by category.
Applicants by Category - Search Results	SS_ADM_APP_SUM_CAT	Click the Search button on the Applicants by Category - Select Search Criteria page.	Recruiting officers use this page to view applicant search results.
Applicants by Category - Program Detail	SS_ADM_APPL_PROG_C	Click the Program Detail link on any of the applicant search results pages.	Recruiting officers use this page to view program details for an applicant.
Applicants by Category - Application Status	SS_ADM_APP_ST_CAT	Click the Application Status link on the Applicants by Category – Program Detail page.	Recruiting officers use this page to view a person's application status.
Applicants by Organization - Select Search Criteria	SS_ADM_APP_REQ_ORG	Self Service, Student Recruiting, View Prospects by Category, View Applicants By Org	Recruiting officers use this page to search for applicants by organization.

Page Name	***Definition Name***	***Navigation***	***Usage***
Applicants by Organization - Search Results	SS_ADM_APP_SUM_ORG	Click the Search button on the Applicants by Organization - Select Search Criteria page.	Recruiting officers use this page to view applicant search results.
Applicants by Region - Select Search Criteria	SS_ADM_APP_REQ_REG	Self Service, Student Recruiting, View Applicants By Region	Recruiting officers use this page to search for applicants by region.
Applicants by Region - Search Results	SS_ADM_APP_SUM_REG	Click the Search button on the Applicants by Region – Select Search Criteria page.	Recruiting officers use this page to view applicant search results.

Chapter 22

Using Academic Advisement Self Service

This chapter lists prerequisites and discusses how to:

- View an advisement report.
- Search for classes by academic requirements.
- View advisee information through self-service pages.
- Process self-service advisement reports.

Prerequisites

Before a student or advisor can use self-service academic advisement features, the student must have a valid user ID in the system. The student must also be matriculated and have a role that includes security access to the pages.

If your institution is processing degree progress reports using transcript types (versus advisement report types), you must turn off security to the component, SAA_SS_DPR_ADB.

Viewing an Advisement Report

This section provides an overview of My Academic Requirements and lists the pages used to view an advisement report.

Understanding My Academic Requirements

The self-service functionality provides students with an interactive advisement report that they can use to evaluate their degree progress, plan courses, and enroll in courses. The report has a date and time stamp so that the student knows when the report was last run.

Depending on your Installation Student Administration setup, you can implement the advisement report using either the Academic Advisement or the Program Guide installation option.

If your institution uses Academic Advisement, the My Academic Requirements page reflects the results of a degree audit. When students access the My Academic Requirements page, satisfied academic requirement groups are collapsed, and unsatisfied ones are expanded. Data about the degree requirements appears in hierarchical structure that corresponds with your institution's advisement setup. For example, a requirement and its contents appear below a heading for a requirement group. In general, lists of courses that may be used or are used to satisfy a given requirement appear below the requirement line, which in turn appears below the requirement. Requirement group report descriptions appear in group boxes, and details about requirements, which are attached to the requirement groups, appear below the requirement groups. Examples of these details include report long descriptions, course statistics, and course lists. Whether specific details, such as requirement line data, appear depends on the setup of your institution. When details are available for a student to view, a caret appears next to the requirement group, requirement, or requirement line, as needed. The icons in the legend and the statuses of *Satisfied* and *Not Satisfied* communicate the completion status of the courses and degree requirements.

The setup of your institution determines whether the report is generated in real time, and it affects which details appear on the report. For example, your institution controls whether a requirement line long description appears on the report or whether the course list should appear. The title and icons that appear in the legend of the report are dictated by the setup of the advisement report type. The advisement report type setup also dictates whether the report reflects the evaluation of in-progress, what-if, shopping cart, and planned courses.

If your institution selects the Program Guide installation option, then the report that appears on the My Academic Requirements page has a different look because the data comes from the Program Guide requirements. Because no degree audit is performed against Program Guide rules, the report does not indicate whether a rule is satisfied or not. Instead, My Academic Requirements displays descriptive information from the Program Guide course lists, requirements, and requirement groups. Courses taken, planned, and in progress appear on the report, but a student, along with his advisor, must evaluate his degree progress. Students can still use the Program Guide report to plan or enroll in courses.

See Chapter 9, "Setting Up Academic Advisement Self-Service," page 105.

Using the Search by My Requirements feature, students can access additional information and perform these actions:

- Access course details.
- View wildcard course list information.
- View information about exceptions and overrides.
- Add classes to their shopping cart.

Pages Used to View an Advisement Report

Page Name	***Definition Name***	***Navigation***	***Usage***
My Academic Requirements	SAA_SS_DPR_ADB	Self Service, Degree Progress/Graduation, My Academic Requirements	Students assess academic progress toward graduation, review course detail, add courses to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.

Page Name	***Definition Name***	***Navigation***	***Usage***
My Academic Requirements	SAA_SS_DPR_AAL	Self Service, Degree Progress/Graduation, My Academic Requirements	Students review their program guide, courses taken, review course detail, add courses to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.
My Academic Requirements – Course Detail	SSS_CRSE_OFFER_DTL	Self Service, Degree Progress/Graduation, My Academic Requirements Click a course description link.	Students review course details, add a course to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.
My Academic Requirements - Course List Detail	SAA_SS_DPR_AAL_WC	Self Service, Degree Progress/Graduation, My Academic Requirements Click a course link.	View details about a course list.
My Academic Requirements	SAA_SS_DPR_ADB_DTL	Self Service, Degree Progress/Graduation, My Academic Requirements Click the numeric link in the Notes column (if applicable).	View a description of any exception or override that affects the course.

Searching for Classes by Academic Requirements

This section provides an overview of the Search by My Requirements feature and lists the pages used to access this feature.

Understanding Search by My Requirements

The Search by My Requirements feature enables students to search for classes based on their degree requirements. The information that appears on the page is based on the student's most recently run advisement report, but the presentation of the information varies from that shown on the My Academic Requirements page because the student using the information intends to enroll in a class.

The main difference between the Search by My Requirements and My Academic Requirements pages is that the course lists include courses offered for the selected term only. Also, whereas the institution may or may not include planned courses on the My Academic Requirements report type, the data included on the Search by My Academic Requirements includes planned courses. As with My Academic Requirements, the data reflects the report type and other advisement setup. Finally, students must be eligible to enroll in order to search for classes by academic requirements.

If your institution selects the Program Guide installation option, then the report that appears in Search by My Academic Requirements looks and operates differently because the data comes from the Program Guide requirements. Also, because no degree audit is performed against Program Guide rules, the report does not indicate whether a degree requirement is satisfied or not.

Using the Search by My Academic Requirements feature, students can access these additional details and perform these actions:

- Access course detail.
- Add courses to their planner.
- View class sections.
- View wildcard course list information.
- View information about exceptions and overrides.

Pages Used to Search by My Requirements

Page Name	***Definition Name***	***Navigation***	***Usage***
Add Classes - Search by My Requirements	SAA_SS_DPR_ADB_SR	Self Service, Enrollment, Enrollment: Add Classes Select the term (as needed). Click the Change button (as needed). Click the My Requirements option. Click Search.	For a selected term, a student can search for classes based on his or her degree requirements.
Add Classes - Course Detail	SSS_CRSE_OFFER_DTL	From the Add Classes – Search by My Requirements page, click a link for a course description.	Students review course details, view class sections for the selected term, and, if term activated, add a class to their shopping cart. Students can also view their course schedule and shopping cart contents for the selected term.

Viewing Advisee Information Through Self-Service Pages

This section lists the pages used to view advisee information using self-service pages.

Pages Used to View Advisee Information Through Self-Service

Page Name	***Definition Name***	***Navigation***	***Usage***
My Advisees	SSS_ADVISEE_LIST	Self Service, Advisor Center, My Advisees	An advisor can view a list of his or her advisees and access other academic and personal information about them, for example, class schedules, term progress, transfer credit reports, and transcripts.
My Advisees - Committee Members	SSS_ADVISEE_COMEMB	Click a committee name on the My Advisees page.	Review committee members, their roles, and their contact numbers.
Advisee Requirements	SAA_SS_DPR_ADB	Click the View Student Details link on the My Advisees page for a student in the list of advisees and on the Advisee Student Center page, select Academic Requirement from the drop-down list.	Advisors can view a student's advisement report.
Advisee Requirements - Course Detail	SSS_CRSE_OFFER_DTL	Click the course description link on the Advisee Requirements page.	Advisors can review course details and, if the student is term activated, view class sections for a specific term.
Advisee Student Center	SSS_STUDENT_CENTER	• Self Service, Advisor Center, Advisee Student Center • Self Service, Advisor Center, My Advisees Click the View Student Details link for an advisee on the My Advisees page or click the Student Center subtab.	Advisors can access an advisee's related transactions and view information such as class schedule, dates, and account information.

Page Name	***Definition Name***	***Navigation***	***Usage***
Advisee General Info (general information)	SCC_SUM_PERSONAL	• Self Service, Advisor Center, Advisee General Info • Self Service, Advisor Center, My Advisees Click the View Student Details link for an advisee. Click the General Info subtab.	Advisors can view information such as an advisee's service indicators, initiated checklists, personal data, and student groups.
Advisee Academics	SCC_SUM_ACADEMICS	• Self Service, Advisor Center, Advisee Academics • Self Service, Advisor Center, My Advisees Click the View Student Details link for an advisee. Click the Academics subtab.	Advisors can view information such as an advisee's career, program, and term summary.
Advisee Transfer Credit	SCC_SUM_TRNSFRCRT	• Self Service, Advisor Center, Advisee Transfer Credit • Self Service, Advisor Center, My Advisees Click the View Student Details link for an advisee. Click the Transfer Credit subtab.	Advisors can view information such an advisees's course and test credits.
Degree Progress Report	SS_ES_AARPT_TYPE	On Advisee Student Center, select Degree Progress Report from the drop-down list box. Click the Go button.	Advisors can view or generate an advisee's degree progress report.
Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on the Degree Progress Report page.	Advisors can run a quick what-if scenario for their advisees.

Page Name	***Definition Name***	***Navigation***	***Usage***
Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on the Degree Progress Report page.	Advisors can run a course list what-if scenario for their advisees.
Emergency Contacts List	SS_CC_EMRG_CNTCT_L	On Advisee Student Center, under Personal Information, select Emergency Contact.	Advisors can view an advisee's emergency contact information.
Enrollment Dates	SSR_SSENRL_APPT	On Advisee Student Center, under Enrollment Dates, select *details.*	Advisors can view an advisee's enrollment appointments.
Advisee Grades	SSR_SSENRL_GRADE	On Advisee Student Center, under Academics, select Grades from the drop-down list box. Click the Go button.	Advisors can view an advisee's grades.
Send Notification	SSS_NOTIFY	Advisor Center, My Advisees Select the Notify Selected Advisees or Notify All Advisees button.	Advisors can send notifications to their advisees.
Advisee To Dos	SS_CC_TODOS	On Advisee Student Center, under To Do List, select *details.*	Advisors can view an advisee's to do list summary.
Advisee Unofficial Transcript	SSS_TSRQST_UNOFF	On Advisee Student Center, Select *Transcript: View Unofficial.*	Advisors can view an advisee's unofficial transcript.
Advisee Class Schedule, Weekly Calendar View	SSR_SS_WEEK	• On Advisee Student Center, under Academics, select My Class Schedule. • On Advisee Class Schedule, select the Weekly Calendar View.	Advisors can view an advisee's weekly schedule.
FERPA Message for Instructor/Advisor	SSR_FERPA_STMNT	Click View FERPA Statement link from any of the Advisor Center subtabs.	Advisors can view the FERPA restrictions and link to the U.S. Department of Education Family Educational Rights and Privacy Act.

Processing Self-Service Advisement Reports

The self-service Degree Progress Report feature enables students and advisors to process and then view advisement reports (that is, advisement transcripts) that your institution defines for self-service processing. Users of this feature can conduct what-if scenarios and can explore the course requirement consequences of completing additional coursework or of changing the student's program of study.

This section lists prerequisites and lists the pages used to perform self-service advising.

See Chapter 16, "Using Self-Service Degree Progress/Graduation," page 155.

Prerequisites

Before individuals at your institution can use the self-service Degree Progress report feature, you must:

- Assign student users an active program, a user ID, and a password.
- Assign advisors a valid user ID and password.
- Set up a self-service advising transcript type.
- Turn off security to the component, SAA_SS_DRP_ADB.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Setting Up Transcripts," Defining Transcript Types

Pages Used to Perform Self-Service Advising

Page Name	*Definition Name*	*Navigation*	*Usage*
Degree Progress Report	SS_ES_AARPT_TYPE	Self Service, Degree Progress/Graduation, View Degree Progress Report	Students and advisors can assess academic progress toward graduation. Students and advisors can run what-if reports to simulate additional coursework completion or to simulate a different academic career, program, plan, or subplan.

Page Name	***Definition Name***	***Navigation***	***Usage***
Report Results	SS_REPORT_RESULT_A	• Self Service, Degree Progress/Graduation, View Degree Progress Report, Report Results • Self Service, Academic Records, View Unofficial Transcript, Report Results	Students and advisors can view the academic advisement report.
View Previously Requested Reports	SS_STUREQ_RSLT	Click the View a Report that you had previously requested link on the Degree Progress Report page or the Unofficial Transcript page.	Students and advisors can review reports that they requested in the past. To view a specific report, students click the corresponding Go button.
Degree Progress Report - Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on the Degree Progress Report page.	Students and advisors can enter hypothetical career, program, subplan, and requirement term information. Students or advisors must enter a required term for every career, program, plan, or subplan override option that they specify.
Degree Progress Report - Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on the Degree Progress Report page.	Students and advisors can enter hypothetical coursework data.
Course List What-If Analysis Report - Course Search	STDNT_CRSE_SECPNL	Click the Search button on the Degree Progress Report - Course List What-If Analysis page.	Students and advisors can select courses for the Course List Analysis report.
What-if Report Selection	SAA_SS_WHATIF_SEL	Self Service, Degree Progress/Graduation, View What-If Report	Students or advisors can access the Create What-If Scenario page or a saved what-if report.
What If Report	SAA_SS_DPR_ADB	Click the Report Date link on the What-If Report page.	Students and advisors can view a saved what-if report.

Page Name	*Definition Name*	*Navigation*	*Usage*
Create What-if Scenario	SAA_SS_WHATIF	Click the Create New Report button on the What-If Report Selection page.	Students and advisors can create a what-if scenario. They can set up a what-if scenario using multiple programs, plans, and subplans. They can set up a course what-if scenario. They can request an advisement report and then evaluate the effect of what-if data on the student's degree progress.
Select Course for What-if Scenario	SSS_BROWSE_CATLG	Click the Browse Course Catalogue button on the Create What-If Scenario page.	Students and advisors can select courses for the what-if scenario.

Chapter 23

Using Self-Service Outreach

This chapter relates specifically to the outreach officer. Student recruiting officer documentation is part of PeopleSoft Recruiting and Admissions. Specifically, this chapter provides an overview of PeopleSoft Outreach for fundraising and discusses how to:

- Create and maintain the My Prospects workset.
- Manage an action plan.
- Manage prospect strategies.
- Manage prospect actions.
- Analyze prospect information.

Understanding PeopleSoft Outreach for Fundraising

PeopleSoft Outreach is a self-service application that provides tools and features for two roles within your organization: the development outreach officer and the student recruiting officer. The fundraising portion of the application is designed to help the outreach officer focus on the prospect, not the process.

The target users of PeopleSoft Outreach include organization employees designated as prospect managers, outreach officers, or other advancement officers who may travel frequently.

Because of the extensive clearance process that exists at many philanthropic organizations, PeopleSoft Outreach strategy and action pages provide records only for those IDs who are actual prospects. The IDs of these prospects are contained in the user's My Prospects workset, which is created on the AV_WORKSET and AV_WORKSET_MBR records.

Various resource assignment processes within PeopleSoft Enterprise Contributor Relations manage additions to the My Prospects workset. When a new assignment is made, the system adds the EMPLID or EXT_ORG_ID of the newly assigned prospect to the user's My Prospects workset. Likewise, when an assignment is no longer active, the system removes the EMPLID or EXT_ORG_ID of the prospect from the My Prospects workset. PeopleSoft Outreach contains a workset initialization and maintenance process, the My Prospects Application Engine process (AV_WS_MYPROS) that controls additions and removals by regenerating the My Prospects workset each time that users run it.

This section discusses PeopleSoft Outreach business processes.

See Also

PeopleSoft Enterprise Contributor Relations 9.0 PeopleBook, "Managing Prospects"

Chapter 21, "Using Self-Service Student Recruiting," page 263

PeopleSoft Outreach Business Processes

For the outreach officer who travels a lot, PeopleSoft Outreach provides a way to easily manage constituent and prospect data while away from the office. The self-service application gives users quick access to the information that they need to cultivate and communicate with constituents and donor prospects. The application also filters and organizes the information and efficiently presents it on self-service pages.

Typically, outreach officers are assigned a number of constituents to manage through the development life cycle. This life cycle includes identifying constituents, informing them of relevant news about the organization's fundraising efforts, gaining their interest in the organization's mission, involving them in activities, and helping them invest in the organization's future. PeopleSoft Outreach presents tools to analyze prospects and to develop strategies to move these constituents through the development life cycle. The prospects that outreach officers manage are generally in the interested, involved, or ready to invest steps of the life cycle.

PeopleSoft Outreach comprises four major processes :

1. My Action Plan
2. Prospect Strategy.
3. Prospect Actions.
4. Prospect information views for analysis.

PeopleSoft Outreach uses PeopleSoft Enterprise Contributor Relations workset functionality to build the My Prospects workset through which a user can easily progress. Building a prospect workset creates a smaller subset of the database that contains only those IDs that are relevant to the outreach officer.

Creating and Maintaining the My Prospects Workset

To use the action and strategy management pages in PeopleSoft Outreach, users need a current My Prospects workset. Your organization can initialize and maintain this workset by running the My Prospects process as well as by assigning resources within PeopleSoft Enterprise Contributor Relations.

This section discusses how to:

- Run the My Prospects process.
- Assign resources to the My Prospects workset.

Page Used to Create and Maintain the My Prospects Workset

Page Name	*Definition Name*	*Navigation*	*Usage*
Outreach Workset Initialization/Maintenance	AV_RUNCTL_OUTR	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Initialize CR, Outreach WS Initialization	Run the My Prospects process to generate or regenerate My Prospects worksets for outreach officers.

Running the My Prospects Process

Access the Outreach Workset Initialization/Maintenance page.

When you run this process, the system:

1. Empties the workset tables AV_WORKSET and AV_WORKSET_MBR for the My Prospects workset.
2. Selects records from resource assignment tables based on the following conditions:

Table	*Conditions*
AV_ASGN_STF_PRP	Include on START_DT < current date and end date > current date
AV_PG_STAFF	Include on START_DT < current date and end date > current date
AV_CNST_ACTN	Include as SLCTR_ID or RSPL_ID and action expiration or complete date + 30 days < current date
AV_CNST_AC_ASGN	Include as STAFF_ID and action expiration or complete date + 30 days < current date

3. Inserts the selected records into the My Prospects workset on the workset tables AV_WORKSET and AV_WORKSET_MBR for any user who has both a STAFF_ID on the AV_STAFF table and a user ID for access to the system.

   The process ignores assignments that are made to someone who is not also a system user. Because staff and volunteers exist in the same AV_STAFF record, volunteers who also have system user IDs have My Prospects worksets built for their user IDs.

Use the Process Monitor to review the status of the process. You can configure Process Scheduler to generate the workset at user-defined intervals.

Note. Oracle recommends that you schedule the My Prospects process to run nightly to keep the My Prospects worksets current for all users.

The functionality of Contributor Relations Outreach is fully realized when each prospect has a constituent type assigned.

See Also

PeopleSoft Enterprise Contributor Relations 9.0 PeopleBook, "Managing Constituent Data," Assigning Constituent Types

PeopleSoft Enterprise Contributor Relations 9.0 PeopleBook, "Managing Constituent Data," Maintaining an Organization's Financial Information

Assigning Resources to the My Prospects Workset

Several resource assignment pages are available within PeopleSoft Enterprise Contributor Relations that enable you to assign a prospect to an outreach officer. These additions immediately update their My Prospects worksets (or create new ones, if none already exist), regardless of whether the My Prospects process has been run.

The following table lists all PeopleSoft Enterprise Contributor Relations pages where you can assign a prospect to an outreach officer, thus updating the My Prospects workset:

Contributor Relations Page or Component	***Assignment Condition***
Resource Assignment component	Any staff or volunteer assignment for a user who also has a system user ID.
Mass Assign Staff page	Any staff or volunteer assignment for a user who also has a system user ID.
Workset Mass Assignments component	Any staff or volunteer assignment for a user who also has a system user ID.
Prospect Action page	Any user assigned as the responsible person, solicitor, or assigned resource.
Action Info page	Any user assigned as the responsible person, solicitor, or assigned resource.
Mass Actions 1 page	Any user assigned as the responsible person, solicitor, or assigned resource.

Contributor Relations Page or Component	***Assignment Condition***
Mass Actions 2 page	Any user assigned as the responsible person, solicitor, or assigned resource.
Workset Mass Actions component	Any user assigned as the responsible person, solicitor, or assigned resource.
Bequest Detail page	Assigned bequest internal resources on the AV_PG_STAFF record.
Trust Detail page	Assigned trust internal resources.
Gift Annuity Detail page	Assigned gift annuity internal resources.
Pooled Income Information page	Assigned pooled income internal resources.

Note. A deletion from any one of these pages or components affects the My Prospects workset only when the My Prospects process runs.

See Also

PeopleSoft Enterprise Contributor Relations 9.0 PeopleBook, "Managing Prospects"

Managing an Action Plan

The links under My Action Plan on the Outreach Home page enable outreach officers to review reminders and manage action plans. This section discusses how to:

- Review reminders.
- View assigned actions.

Pages Used to Manage an Action Plan

Page Name	***Definition Name***	***Navigation***	***Usage***
My Reminders	AV_MYREMINDERS	Self Service, Outreach, My Prospects, My Reminders	View actions that need immediate or current attention.

Page Name	Definition Name	Navigation	Usage
My Action Plan	AV_OUTR_TODO_LIST	Self Service, Outreach, My Prospects, My Action Plan	View all actions.

Reviewing Reminders

The My Reminders page appears even if no reminders exist. For reminders to appear, the user's ID must have at least one prospect action assigned to it.

This page displays actions in three categories (Past Due, Due Today, and Upcoming) based on the planned date. The system sorts the reminders to appear in alphabetical order. Prospects are constituents who are affected by the action. Users click an action description to display details on the Prospect Action Summary page, where users can then edit the action. The Action Type field describes the type of action required. Action type values are defined on the Action Types page. The Planned Date and Complete Date fields appear when the action is intended to occur and when it actually occurred. The Action Status field indicates whether the action is *Scheduled, Pending, On Hold, Completed,* or *Cancelled.* The organization can add additional status values on the Setup Action Status page. The Result field displays the outcome of the action.

Users enter the number of upcoming days for which to display reminders (based on the planned date). The default display is the current date plus seven. To expand or shorten the displayed list, users enter a new value in the Number of Upcoming Days field and click the Refresh button. Users click the Save as Default button to save the value in this field as the new default display period for that user.

Users click the Outreach link on the portal navigation to return to the Outreach navigation page. If they have modified the number of upcoming days, the system prompts them to save their changes.

Viewing Assigned Actions

The My Action Plan page appears even if no action plan items exist. For items to appear, the user's ID must have at least one prospect action assigned to it.

This page is populated with all current (incomplete) actions that are before or equal to today's date and the value of the Reminder Days field defined on the CR Installation page. To choose a different range of actions, users first must select an institution, then enter a date range. When they click the Refresh button, the page displays actions that are assigned to the user that meets the institution and date criteria, sorted in alphabetical order by prospect name. Prospects are constituents who are affected by the action.

Users click an action description to display details on the Prospect Action Summary page, where users can then edit the action. The Action Type field describes the type of action required. Action type values are defined by your organization on the Action Types page. The Planned Date and Complete Date fields show when the action is intended to occur and when it actually occurred. The Action Status field lists whether the action is *Scheduled, Pending, On Hold, Completed,* or *Cancelled.* The organization can add additional status values on the Setup Action Status page. The Result field displays the outcome of the action.

Managing Prospect Strategies

This section discusses how to:

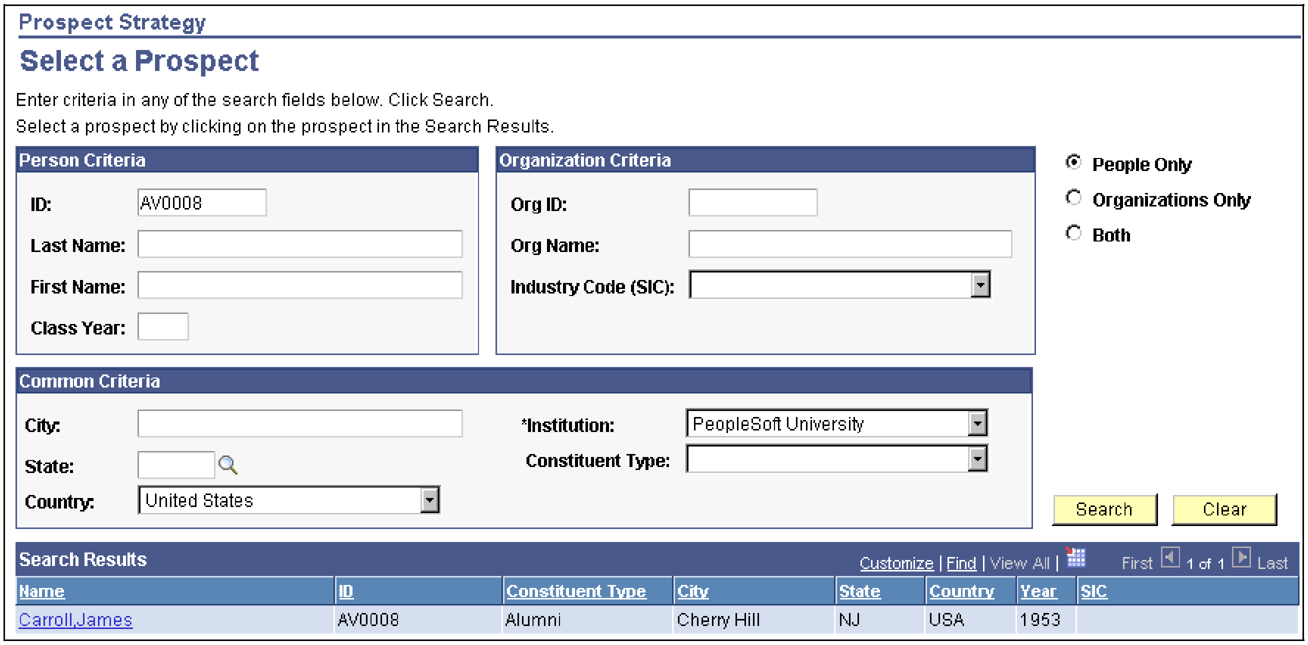
- Select a prospect name.
- Edit or add a prospect strategy.
- Edit or add prospect strategy details.
- Link a prospect strategy to initiatives.
- Link a prospect strategy to actions.
- View a prospect strategy summary.

Pages Used to Manage Prospect Strategies

Page Name	***Definition Name***	***Navigation***	***Usage***
Prospect Strategy - Select a Prospect	AV_OUTR_SRCH	Self Service, Outreach, My Prospects, My Stewardship Plans, Add/Update a Strategy	Search for and select a prospect strategy record from the My Prospects workset.
Prospect Strategy - Edit Strategy	AV_OUTR_STRT_LIST	Click a prospect name in the Search Results area of the Prospect Strategy - Select a Prospect page.	Select a prospect strategy to edit, add, or delete.
Prospect Strategy - Strategy Detail	AV_OUTR_STRT_DTL	Click a link under the Strategy Name heading or click the Add a Strategy button on the Prospect Strategy - Edit Strategy page.	Enter or update a specific strategy plan for cultivating the prospect.
Prospect Strategy - Linked Initiatives	AV_OUTR_STRT_INIT	Click the Next button on the Prospect Strategy - Strategy Detail page.	Link a prospect strategy to one or more initiatives, if appropriate.
Prospect Strategy - Linked Actions	AV_OUTR_STRT_ACTN	Click the Next button on the Prospect Strategy - Linked Initiatives page.	Link a prospect strategy to one or more actions. Users can also use this page to view linked spouse actions.
Prospect Strategy - Summary	AV_OUTR_STRT_SMRY	Click the Next button on the Prospect Strategy - Linked Actions page.	View and print a prospect strategy summary.

Selecting a Prospect Name

Access the Prospect Strategy - Select a Prospect page (Self Service, Outreach, My Prospects, My Stewardship Plans, Add/Update a Strategy).



Prospect Strategy - Select a Prospect page

To add or update prospect strategies, outreach officers must first access the Prospect Strategy page, search their prospect worksets, and select prospect names. After a user selects a name, that user can then add new strategies or edit existing ones on that prospect record.

To search for a prospect, select an institution and any additional combination of search values.

When you click the Search button, the results appear at the bottom of the page in alphabetical order. At any point, you can clear search values.

Note. Search pages for strategies and actions in PeopleSoft Outreach are populated only with members of the My Prospects workset.

The following format restrictions apply to the fields on this page: The value in the Class Year field must be in CCYY format (century/year), the value in the City field must use initial capitals and include spaces between words, and the value in the Org Name field must be uppercase and exclude spaces between words. In addition, note that the values in the ID fields (Last Name,First Name, and Org Name) convert to uppercase when you click the Search button.

Person Criteria

The fields in this group box apply only to person records. When you enter search criteria in this group box and click the Search button, the system also uses criteria entered in the Common Criteria group box, but ignores any criteria entered in the Organization Criteria group box.

To search for a person, enter an employee ID, first name, last name, or class year.

Organization Criteria

The fields in this group box apply only to organization records. When you enter search criteria in this group box and click the Search button, the system also uses criteria entered in the Common Criteria group box, but ignores any criteria entered in the Person Criteria group box.

To search for an organization, enter values in the Org ID,Org Name, or Industry Code (SIC) fields.

Common Criteria

Use the fields in this group box to search for people, organizations, or both.

The system populates the Institution and Country fields by default. The default country value depends on your installation setup, but you can change the value here. The values in the State field depend on the country selected.

Constituent Type field values relate specifically to either people or organizations. The value that you select affects your search results. For example, if you search for organizations but choose a person constituent type of *Alumni,* the search displays no prospect records.

Note. Valid constituent types are shipped with your system and should not be altered.

Examples

Here are three examples of search results:

- If you enter a city and a constituent type, the search results display all prospects with the selected constituent type who live in that city.
- If you enter a person ID, but select the Organizations Only search option, the system ignores the values in the Person Criteria group box.

  The search results display no people, but instead display all organizations that meet the common criteria.
- If you enter a person's partial last name and a partial organization name and then select the Both search option, the system searches for person and organization prospects that meet the criteria in either group box.

  The search results display all people and all organizations that meet the partial name criteria.

Editing or Adding a Prospect Strategy

Access the Prospect Strategy - Edit Strategy page (click a prospect name in the Search Results area of the Prospect Strategy - Select a Prospect page).

To edit an existing strategy, click a link under the Strategy Name heading. If no strategies exist for the prospect and you want to add a new strategy, then click the Add a Strategy button. Both the link and the button access the Prospect Strategy - Strategy Detail page. If you are adding a new strategy, then you must enter the strategy detail information on the Prospect Strategy - Strategy Detail page. If you are editing an existing strategy, the system populates the Prospect Strategy - Strategy Detail page with the existing data.

To remove an entire strategy from a prospect's record, select the appropriate check box and click the Delete button. A warning message appears, asking you to click the OK button to confirm the deletion or click the Cancel button to return to the Prospect Strategy - Edit Strategy page. You can delete multiple strategies at once.

Editing or Adding Prospect Strategy Details

Access the Prospect Strategy - Strategy Detail page (click a link under the Strategy Name heading or click the Add a Strategy button on the Prospect Strategy - Edit Strategy page).

Page Layout

All of the Prospect Strategy pages display the same information at the top of the page: the step of the process; the prospect's name, email address, and highest-ranking constituent type; and the name of the assigned prospect manager. You can click the email address link to launch your email program and send a message to the prospect, then return to this page in the process. For a prospect who is a person, you can access the Constituent Type Summary page, which lists all assigned constituent types for the prospect.

Several buttons can appear in the upper-right corner of the page:

	View information for the prospect's spouse record in the system.
	Assign or view communication records for the prospect.
	Assign or view checklists for the prospect.
	Add a comment or view a list of all comments about the prospect.
	View Family Educational Rights and Privacy Act (FERPA) biographic information for the prospect.
	View details about the service restrictions that are associated with negative service indicators for the prospect.
	View details about the positive service indicators for the prospect.

In addition, the navigation buttons on this page apply to all of the Prospect Strategy pages.

Strategy Detail

In this section, you enter or change a strategy name, select its status, and select whether to link the strategy to the prospect's spouse and manage the prospects as a couple.

Note. The Apply Strategy to Spouse option is available only if a spouse exists for the prospect in the system.

You can also enter or edit a detailed strategy description using the long free-text description field and mark the date and time of each descriptive entry.

Linking a Prospect Strategy to Initiatives

Access the Prospect Strategy - Link Strategy to Initiatives page.

The instructions on the page lead you through this optional process of linking an initiative to the strategy. Adding a campaign initiative to a prospect's strategy results in the prospect being identified as a prospect for that campaign. You select an initiative type from the available options. In addition to these delivered types, the organization can define more types on the Setup Initiative Types page. After selecting the type, you enter an initiative of that type or selects one from the prompt.

Linking a Prospect Strategy to Actions

Access the Prospect Strategy - Linked Actions page (click the Next button on the Prospect Strategy - Linked Initiatives page).

Outreach officers can use the Prospect Strategy - Linked Actions page to manage specific actions to achieve the strategy. The page instructions lead you through the process of editing any existing actions; you can also click the Add an Action button to link new ones. Any actions previously added and linked to the strategy appear on this page. You can click a link under the Action heading to display the populated Prospect Action - Action Detail page; you can click the Add an Action button to display a blank Prospect Action - Action Detail page.

This page also displays any actions that have been added to a spouse's record that are linked to this strategy. You can click the Action link to display the Prospect Action - Action Detail page.

See Also

Chapter 23, "Using Self-Service Outreach," Editing or Adding Prospect Action Details, page 290

Viewing a Prospect Strategy Summary

Access the Prospect Strategy - Summary page (click the Next button on the Prospect Strategy - Linked Actions page).

You can print the page using your web browser's print functionality (File, Print, or Ctrl+P). You can edit any section or click the appropriate number in the upper-left portion of the page to return to the step that enables you to edit that part of the process.

To return directly to the summary from the edited step, you can click the last of the numbered circles in the upper-left corner of the page.

After viewing the summary information, you must save the transaction if you did not save the strategy in a prior step.

Managing Prospect Actions

This section discusses how to:

- Select a prospect name prior to managing prospect actions.
- Edit or add a prospect action.
- Edit or add prospect action details.

- (Optional) Edit or add ask information.
- (Optional) Edit or add prospect action descriptions.
- Assign resources to prospect actions.
- Link prospect actions to initiatives.
- View a prospect action summary.
- Select a prospect name prior to completing an action.
- Select an action to complete.
- Complete a prospect action.
- Select a prospect name prior to completing a contact report.
- Enter contact report details.
- View a contact report summary.
- Send a contact report.
- Send updated biographical information.

Pages Used to Manage Prospect Actions

Page Name	***Definition Name***	***Navigation***	***Usage***
Prospect Action - Select a Prospect	AV_OUTR_SRCH	Self Service, Outreach, My Prospects, My Stewardship Plans, Add/Update an Action	Search for and select a prospect action record from the My Prospects workset.
Prospect Action - Edit Action	AV_OUTR_ACTN_LIST	Click a name in the Search Results area of the Prospect Action - Select a Prospect page.	Select a prospect action to edit.
Prospect Action - Action Detail	AV_OUTR_ACTN_DTL	Click a link under the Action Description heading or click the Add an Action button on the Prospect Action - Edit Action page.	Enter or update an action step for a prospect that will be carried out by a staff member or volunteer.
Prospect Action - Ask Information	AV_OUTR_ACTN_ASK	Click the Next button on the Prospect Action - Action Detail page.	Enter details about an action that includes a donation request (ask). If the action type on the Prospect Action - Action Detail page is not *Ask*, you should skip this page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Prospect Action - Action Description	AV_OUTR_ACTN_DSCR	Click the Next button on the Prospect Action - Ask Information page.	Enter detailed information related to the action. If the action does not require further description, you can skip this page.
Prospect Action - Assigned Resources	AV_OUTR_ACTN_ASGN	Click the Next button on the Prospect Action - Action Description page.	Assign other resources to the action. If appropriate, you can skip this page.
Prospect Action - Linked Initiatives	AV_OUTR_ACTN_INIT	Click the Next button on the Prospect Action - Assigned Resources page.	Link campaign, event, membership, volunteer, or other initiatives to the action. If appropriate, you can skip this page.
Prospect Action - Summary	AV_OUTR_ACTN_SMRY	Click the Next button on the Prospect Action - Linked Initiatives page.	View and print a prospect action summary.
Prospect Action Results - Select a Prospect	AV_OUTR_SRCH	Self Service, Outreach, My Prospects, My Stewardship Plans, Complete an Action	Search for and select a prospect record from the My Prospects workset that has an action to complete.
Prospect Action - Results - Edit Action	AV_OUTR_RSLT_LIST	Click a name in the Search Results area of the Prospect Action Results - Select a Prospect page.	Select a specific action to complete.
Prospect Action - Results	AV_OUTR_ACTN_RSLT	Click a link under the Action Description heading on the Prospect Action - Results - Edit Action page.	Enter the specific results of a completed action.
Prospect Contact Report - Select a Prospect	AV_OUTR_SRCH	Self Service, Outreach, My Prospects, My Stewardship Plans, Complete Contact Report	Search for and select a prospect record from the My Prospects workset to complete and send a contact report.
Prospect Contact Report - Detail	AV_OUTR_ACTN_CNCT	Click a name in the Search Results area of the Prospect Contact Report - Select a Prospect page.	Enter constituent contact report details.
Prospect Contact Report - Summary	AV_OUTR_ACTN_CSMRY	Click the Printer Friendly Version link on the Prospect Contact Report - Detail page.	View a printable summary of all information on the contact report.

Page Name	Definition Name	Navigation	Usage
Send Contact Report	AV_OUTR_CNCT_SEND	Click the Send Report button on the Prospect Contact Report - Detail page.	Send a completed contact report to a list of users.
Send BioDemo Update	AV_OUTR_BIO_SEND	Click the Send BioDemo Update button on the Prospect Contact Report - Detail page.	Send updated biographical and demographic data, learned during a prospect contact, to the department responsible for updates to biodemo data.

Selecting a Prospect Name Prior to Managing Prospect Actions

Outreach officers can manage prospect actions by using the three links on the Outreach Home page. Their options are to add or update an action, complete an action, or complete a prospect contact report.

To add or update prospect actions, outreach officers must first access the Prospect Action page, search their prospect worksets, and select prospect names. When a user selects a name, that user can then add new actions or edit existing ones on that prospect record.

See Also

Chapter 23, "Using Self-Service Outreach," Selecting a Prospect Name, page 283

Editing or Adding a Prospect Action

Access the Prospect Action - Edit Action page (click a name in the Search Results area of the Prospect Action - Select a Prospect page).

This page lists each action associated with the prospect, its status, and its planned completion date.

1. Select an action description, to edit an existing action.
2. Click the Add an Action button, if no existing actions are available, for the prospect and you want to add a new action.

   Note. Both the link and the button access the Prospect Action - Action Detail page.

3. Enter the action detail information, If you are adding a new action.

   The system populates the Prospect Action - Action Detail page with the existing data.

Editing or Adding Prospect Action Details

Access the Prospect Action - Action Detail page (click a link under the Action Description heading or click the Add an Action button on the Prospect Action - Edit Action page).

Users enter or change an action description and select its status from the available options. Next, users enter an expected completion date for the action as well as a date when the action expires if it is not completed. The action no longer appears in the current actions lists on the My Reminders page when the action is expired. It does appear on the My Action Plan page if the date range entered includes the action date of the expired action. The expected completion date appears in grids as the planned date. Users also have options to select an action type and method of contact. Available values for the Action Type and Method fields on this page are defined by the organization. To complete the action, users select a responsible person. When users enter the responsible person's ID, the responsible person's name appears to the right of the ID field. Finally, users may select the strategy that this action supports.

Note. The values for the Responsible Person Type field are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

See Also

Chapter 23, "Using Self-Service Outreach," Editing or Adding Prospect Strategy Details, page 286

(Optional) Editing or Adding Ask Information

Access the Prospect Action - Ask Information page (click the Next button on the Prospect Action - Action Detail page).

If the action type is *Ask,* outreach officers must enter specific ask information on this page. Users enter the monetary range (From and To amounts) that will be requested as a donation. The type of solicitor for the donation and the solicitor name are required if the action is an ask. Only resources defined with a role of Solicitor *(SOL)* appear in the Solicitor field.

If the action type is not *Ask*, the system skips this page in the component. Users can return to view the page, but the fields are unavailable for entry.

Note. The values for solicitor type are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

(Optional) Editing or Adding Prospect Action Descriptions

Access the Prospect Action page .

This page contains a 254-character free-form text field in which outreach officers can enter brief details of the action. Users can mark the date and time of each descriptive entry by clicking the Date/Time Stamp button.

Assigning Resources to Prospect Actions

Access the Prospect Action - Assign Others to Action page.

If users want to assign additional resources to the action, they can add them on the Prospect Action - Assigned Resources page. Assigned resources assist the outreach officer in completing the action either by providing information or by actual involvement in the action itself. Roles indicate the assigned resource's relation to the action; the institution defines these values.

To add a resource, users select the resource type, and then enter the role and the ID of the resource assigned.

Note. The values for the Resource Assigned field are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

Linking Prospect Actions to Initiatives

Access the Prospect Action - Linked Initiatives to Action page.

If outreach officers want to link initiatives to an action, they can add them on the Prospect Action - Linked Initiatives page. Linking a campaign initiative to an action means that the prospect appears on the prospect list for that campaign. To begin, a user clicks the Add an Initiative button. Next, the user enters an initiative type and initiative code. The name of the initiative appears to the right of the code. The organization defines the initiative type code values on the Initiative Types page.

Viewing a Prospect Action Summary

Access the Prospect Action - Summary page (click the Next button on the Prospect Action - Linked Initiatives page).

When the outreach officer finishes entering or editing all of the desired action information, the Prospect Action - Summary page appears. Users can print the page using their web browser's print functionality (File, Print or Ctrl+P). If a user wants to edit a section, the user can return to the step that enables editing of that part of the process by clicking the Edit button.

If outreach officers click the Send Report button, the Send Contact Report page appears where they can enter action report information. When users complete a prospect contact report using the Send Contact Report page, the system creates an enhanced contact report.

The following example shows the information contained in the contact report:

* * * Constituent Information * * *

ID: AV0008
Name: James Carroll

Constituent Type: Alumni
City, State: Cherry Hill, NJ
Gender: Unknown

* * * Action Information * * *

Number: 100
Brief Description: Test action

Description:
4/6/2005 09:17 AM -
Leadership opportunity

Planned Date: 2005-04-06
Complete Date: 2005-04-06

Type: Invitation
Contact Type: E-mail message
Status: Complete
Result: Accepted

* * * Contact Report Information * * *

Author: Carroll,Bruce
Report Date: 2005-04-06

4/6/2005 09:24 AM - James was delighted with the invitation and suggested several classmates to join in the effort.

Send contact report example

These reports provide detailed information and enable outreach officers to send copies of incomplete actions as well as completed contact reports to other resources. Your organization can use these reports as an effective communication tool.

To return directly to the summary from the edited step, users can click the last of the numbered circles in the upper-left corner of the page.

When finished viewing the summary information, if they have not already done so, users must save the transaction if they want to keep it.

Selecting a Prospect Name Prior to Completing an Action

To complete prospect actions, outreach officers must first access the Prospect Action - Results page, search their prospect worksets, and select prospect names. When a user selects a name, that user can then complete actions on a prospect record.

See Also

Chapter 23, "Using Self-Service Outreach," Selecting a Prospect Name, page 283

Selecting an Action to Complete

Access the Prospect Action - Results - Edit Action page (click a name in the Search Results area of the Prospect Action Results - Select a Prospect page).

This page lists each action associated with the prospect, its status, and its planned date for completion. Outreach officers click a link under the Action Description heading to select the action that they want to complete; the system displays the Prospect Action - Results page.

Completing a Prospect Action

Access the Prospect Action - Results page (click a link under the Action Description heading on the Prospect Action - Results - Edit Action page).

In addition to the usual prospect information at the top of the page, this page also displays the name of the action.

Action Results

Outreach officers select an action status. The status has a default value of *Complete.* Users also must select a result code. The organization can define other values as well.

Next, users complete the Complete Date field. The current date appears by default the first time that the page is accessed for an action, but the default value can be overwritten. If the ask resulted in a commitment, enter the expected commitment amount, or the monetary amount that you expect to receive from the donor because of this action. The Actual Commitment field displays the monetary amount that the organization received because of this action.

Action Results - Pledge

Users can enter the pledge number for a pledge that resulted from the action. Users click the Details link to view the Pledge Detail page.

Action Gifts

Users can enter the gift number for a gift that was received as a result of the action. Users click the Details link to view the Gift Detail page. To add another gift to the action results, users click the Add a gift button. Users click the Add another Action button to start the process for creating a new action for that prospect.

When saving the page, if the user entered a gift number, the date and gift amount appear to the right of the gift number. The process works similarly if a user enters a pledge number. The date and time that the action was last updated appear at the bottom of the page.

Users can click the Contact Report button to go directly to the Prospect Contact Report page.

See Also

Chapter 23, "Using Self-Service Outreach," Entering Contact Report Details, page 295

Selecting a Prospect Name Prior to Completing a Contact Report

Users can complete a contact report in two ways:

- If they are at the end of the process for completing an action, they can click the Contact Report button on the Prospect Action - Results detail page.

  The system displays the Prospect Contact Report - Detail page.

- If they are at the beginning of the process for completing a contact report, they must first access the Prospect Contact Report page, search their prospect worksets, and select prospect names.

  When users select a name, they can complete a contact report for that prospect.

See Also

Chapter 23, "Using Self-Service Outreach," Selecting a Prospect Name, page 283

Entering Contact Report Details

Access the Prospect Contact Report page.

In addition to the usual prospect information at the top of the page, this page also displays the name of the action.

Contact Report Detail

Outreach officers first enter their author IDs (the author ID is the user ID by default) and the report dates (the report date is the current date by default). Users can view a printer-friendly version of the Prospect Contact Report summary page.

The Report field is a long free-form text area where outreach officers can enter any details of the prospect contact, such as what happened as a result of the action or notes about possible further contacts. Users click the Date/Time Stamp button to mark the date and time of each descriptive entry. If users learn new information about a new prospect, they can link other prospects to this contact report by using the Link Report to Other Prospects section.

Link Report to Other Prospects

To link the report to a prospect's spouse, click the Link to Spouse button. The spouse ID appears in the ID field. Users can then access the same contact report through either the prospect ID or the spouse ID.

Note. The Link to Spouse button appears only if a spouse exists for the prospect in the system.

To link the report to other prospects, users select a value in the ID Type field and enter an ID. The linked prospect's name appears to the right of the ID. ID type values are delivered by the system. To link to more than one prospect, users click the Link another Prospect button. Users can also click the Delete button to unlink any currently linked prospects from the action.

Users click the Save button to save the contact report. The date and time that the action was last updated appear above the Report field. Users click the Send Report button to access the Send Contact Report page. Users click the Send BioDemo Update button to access the Send BioDemo Update page.

See Also

Chapter 23, "Using Self-Service Outreach," Sending a Contact Report, page 296

Chapter 23, "Using Self-Service Outreach," Sending Updated Biographical Information, page 296

Viewing a Contact Report Summary

Access the Prospect Contact Report - Contact Report Summary page.

Users can review all contact report information online or print the complete contact report page as well using their web browser's Print functionality (File, Print or Ctrl+P).

After printing or viewing, users can return to the Prospect Contact Report - Detail page.

Sending a Contact Report

Access the Send Contact Report page (click the Send Report button on the Prospect Contact Report - Detail page).

When outreach officers complete a contact report and are ready to distribute it, they can use this page to send it to anyone in the organization. They can define their distribution lists by selecting the ID type of the recipients and entering the distribution ID. A user can also select a *Role* ID type to send the report to all users with the selected security role. A user can also enter any other email address list members to include in the distribution, separating multiple email addresses with a semicolon. A user is required to either define an ID type and distribution ID or enter an email address to send the contact report. The system sends emails to the email addresses for users as defined on the Maintain Security - User Profiles page.

The system populates the Email portion of the page with a default subject description that includes the prospect name and action description. The Email Text field contains the outreach officer's name and the entire contents of the contact report from the Prospect Contact Report Detail page. Users can edit any field and add any discussion text necessary.

When finished, a user clicks the Send button to trigger the workflow that sends the contact report to the defined distribution list. That user receives a confirmation message that the email was sent, then clicks OK or Cancel to return to the Send Contact Report page. If a user clicks Return instead of Send prior to sending, the system cancels the workflow and returns to the Prospect Contact Report Detail page.

Sending Updated Biographical Information

Access the Send BioDemo Update page (click the Send BioDemo Update button on the Prospect Contact Report - Detail page).

During the course of managing a prospect, outreach officers occasionally learn new biodemo information. This page enables users to distribute this new information to anyone in the organization. Users can define their distribution lists by selecting the ID types of the recipients and entering their distribution IDs. A user can also select a *Role* ID type to send the report to all users with the selected security role. They can also enter any other email address list members that they want to include in the distribution, separating multiple email addresses with semicolons. Users are required to either define an ID type and distribution ID or enter an email address to send the contact report. The system sends emails to the email addresses for users as defined on the Maintain Security - User Profiles page.

The system populates the Email portion of the page with a default subject description that includes the prospect name and ID. The Email Text field begins with the outreach officer's name; users can then enter any updated information that is associated with the prospect.

When finished, users click Send to trigger the workflow that sends the contact report to the distribution list. They receive a confirmation message that the email was sent, then click OK or Cancel to return to the Send Contact Report page. If users click Return instead of Send prior to sending, the system cancels the workflow and returns to the Prospect Contact Report - Detail page.

Analyzing Prospect Information

PeopleSoft Enterprise Contributor Relations provides a number of pages that outreach officers can use to analyze prospect information. PeopleSoft Outreach offers a menu structure that gathers and delivers an assortment of pages that facilitate an outreach officer's responsibilities. The links within these pages lead to either a run control page for a report or an inquiry page of summarized prospect information. These pages are not limited to the My Prospects workset and can be accessed for any constituent in the system.

This menu contains submenu links to personal information, organizational information, prospect lists and worksets, stewardship details, and PeopleSoft Enterprise Contributor Relations reports. The following table summarizes these menu paths and lists all prospect analysis information pages that PeopleSoft Outreach delivers:

Menu Navigation	***Prospect Information Page***
Self Service, Outreach, View Person Information, Constituent Information	Person Profile
	Involvement Summary
	Membership History
	Audience History
	Event History
	Volunteer History
	Relationship Summary

Menu Navigation	*Prospect Information Page*
	Communication Summary
	Comment Summary
	Checklist Summary
Self Service, Outreach, View Person Information, Prospect Information	Strategy Summary
	Clearance Summary
	Personal Assets
	Ratings Summary
	Philanthropic Interests
	Donor Appreciation Summary
	Planned Giving Profile
	Action Summary
	Contact Report Summary
	Prospect Assignments
Self Service, Outreach, View Person Information, Giving Information	Giving Profile
	Commitment Summary
	Commitment Register
	Transaction Register
	Giving Club Progress

Menu Navigation	*Prospect Information Page*
	Open Pledge Register
Self Service, Outreach, View Organization Information, Constituent Information - Org	Organization Profile
	Relationship Summary
	Involvement Summary
	Membership History
	Employee List
	Audience History
	Communication Summary
	Comment Summary
	Checklist Summary
Self Service, Outreach, View Organization Information, Prospect Information - Org	Strategy Summary
	Action Summary
	Contact Report Summary
	Clearance Summary
	Ratings Summary
	Philanthropic Interests
	Donor Appreciation Summary
	Prospect Assignments

Menu Navigation	*Prospect Information Page*
Self Service, Outreach, View Organization Information, Giving Information - Org	Giving Profile
	Commitment Summary
	Commitment Register
	Transaction Register
	Open Pledge Register
	Matching Gifts
	Giving Club Progress
Self Service, Outreach, View Lists	Person Profile
	Campaign Prospects
	Top Donors
	Giving Club Membership
	Involvement Roster
	Profile Compare
Self Service, Outreach, View Reference Information	Campaigns
	Giving Clubs
	Designations
Self Service, Outreach, CR Reports	Bio-Bit Report - Person
	Bio-Bit Report - Organization

Menu Navigation	Prospect Information Page
	Bio-Bit Report - Workset
	Designation Donors
	Campaign Progress
	Role Assignments

Chapter 24

Using Self-Service Student Admissions

This chapter discusses how applicants or visitors:

- Request information.
- Accept or decline admission.
- View application status.

Requesting Information

Visitors can request information from your institution through PeopleSoft Campus Self Service.

Understanding Self-Service Request Information

Campus Self Service enables you to capture prospect data over the internet. When visitors to your website request admissions information, they can enter information about themselves that the system converts to prospect data. For example, they can enter academic interests, test scores, academic program information, and more. The system takes this information and creates a prospect record. To request admissions information, a visitor must have a user ID and password.

After a person obtains a user ID and password, he or she has access to the Request Information feature. However, before submitting the request for information, the system prompts the visitor for information based on your setup options. The visitor enters the academic career in which he or she is interested, plus the academic institution (if your institution is a part of a multi-institution system). You can decide what other prospect data you want to collect. You can collect academic information, such as admit term, admit type, campus, academic level, academic load, housing interest, and financial aid interest; and school information, such as last school attended and graduation date. The information that the prospect enters depends on your setup. Some pages and fields appear and hide depending on the information that you want from prospects. For example, the Academic Interests and Test Results self-service pages are only available if you select those segments on the Web Prospect Setup page.

After the visitor enters the information and submits the request, the system creates a prospect record. You can view the new prospect record in the Prospect Data component. If you choose to collect academic interest information, and the visitor chooses to enter this information, you can view the data in the Academic Interests component. If you choose to collect test score data, and the visitor chooses to enter this information, you can view the data in the Test Results component. The system also updates the Communication Management component for the person according to your setup and the prospect's response. If a prospect record for that person already exists, the system updates the admit term, admit type, last school attended, graduation date, academic program, and academic plan (assuming that you chose to collect this data and that the visitor entered it).

You can edit the text messages on the Request Information self-service pages. These messages are in the message catalog under the message set number 14230. Changing these messages is considered a modification to your software.

See Also

Chapter 8, "Setting Up Recruiting and Admissions Self-Service," page 99

Pages Used to Request Information

Page Name	Definition Name	Navigation	Usage
Request Admission Materials	ADM_WEB_PRS_INTRO	• Self Service, Student Admission, Request Information • Self Service, Request Information	Visitors view introductory text about requesting admission materials, such as how to move from page to page and how to prompt for values.
Request Information	ADM_WEB_PRS_CAR	Click the Next button on the Request Admission Materials page.	Visitors add, delete, or edit the academic careers for which they want to request information. **Note.** Only academic programs, plans, and subplans with a Last Prospect Date greater than the system date or blank are available.
Request Information—I am Interested in Attending	ADM_WEB_PRS_CAR_SP	Click the Add button on the Request Information page.	Visitors enter academic career, academic information, school information, and academic program information, depending on your set up in the Web Prospect Setup page.
Academic Interests	ADM_WEB_PRS_INT	Click the Next button on the Request Information page.	Visitors can select their academic interests. This page appears to visitors if you enable this segment on the Web Prospect Setup page.
Test Results	ADM_WEB_PRS_TST	Click the Next button on the Academic Interests page.	Visitors can enter test results. This page appears to visitors if you enable this segment on the Web Prospect Setup page.

Page Name	Definition Name	Navigation	Usage
Test Results	ADM_WEB_PRS_TST_SP	Click the Add button on the Test Results page.	Visitors add test details, such as test name, scores, percentiles, and dates.
Submit	ADM_WEB_PRS_SUB	Click the Next button on the Test Results page.	Visitors submit the request.
Your request for information has been processed	ADM_WEB_PRS_END	Click the Submit button on the Submit page.	Visitors view a message confirming that their request was successfully submitted.

Accepting or Declining Admission

Applicants can view their application status and accept or decline admission using self-service pages.

You can edit the text messages on both the Accept Admission self-service page and the Decline Admission self-service page. These messages are in the message catalog under the message set number 14200.

If the applicant accepts admission, the system inserts an effective-dated row on the Application Program Data page with a program action of *Intention to Matriculate.* The system sets the effective date to the day the student accepts admission.

If the student declines admission, the system inserts an effective-dated row on the Application Program Data page with a program action of *Applicant Withdrawal.* The system sets the effective date to the day the student declines admission.

Additionally, any data that is provided about the school that the student is going to attend and why they choose that institution over this one is inserted on the Application Student Response page. Each of the pages above is within the Maintain Applications component.

Pages Used to Accept of Decline Admission

Page Name	Definition Name	Navigation	Usage
Accept Admission	SS_ADM_ACCEPT	• Self Service, Student Admission • Self Service, Admissions	This page appears if the applicant has no application to accept or decline.
Accept Admissions–Select Application	SS_ADM_ACCEPT2	• Self Service, Student Admission • Self Service, Admissions	Applicants can select the application that they want to accept or decline. If an applicant was admitted to multiple academic careers or academic programs, each application will appear on this page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Accept or Decline Admission	SS_ADM_ACC_DEC	Click the Accept/Decline link for the application that you want to process.	Applicants select whether they want to accept or decline admission.
Confirm Acceptance	SS_ADM_ACCEPT3	Click the I Accept Admission button on the Accept or Decline Admission page.	Applicants can confirm their acceptance.
Admittance Accepted!	SS_ADM_ACCEPT4	Click the Confirm Acceptance button on the Confirm Acceptance page.	This page appears to show that the applicant's selection has been processed.
Confirm Decline	SS_ADM_DECLINE1	Click the I Decline Admission button on the Accept or Decline Admission page.	Applicants can confirm that they want to decline admission.
Admission Declined	SS_ADM_DECLINE2	Click the Confirm Decline button on the Conform Decline page.	This page appears to show that the applicant's selection has been processed. Also, applicants can enter a the reason they declined admission and the institution they chose to attend. Applicants can select the institution from the prompt, or they can enter the institution in the free-from field if you selected Free Form Institution on the Installation Defaults - AD page. The information the applicant enters on this page posts to the Application Student Response page in the Application Maintenance component.

Viewing Application Status

This section discusses how applicants view their application status through Campus Self Service.

Pages Used View Application Status

Page Name	***Definition Name***	***Navigation***	***Usage***
Application Status	SS_ADM_APP_STATUS	• Self Service, Student Admission • Self Service, Admissions	Applicants can view the status of their applications.

Viewing Application Status

Application status is based on the status of the checklists assigned to this application. If one or all checklists are complete, the status will show *Complete.* If one or all checklists are incomplete, the status will show *Incomplete* and the Show outstanding items for this application button appears. Applicants can press this button in order to view their outstanding items that must be received in order for the application to be processed.

Chapter 25

Using Community Directory Search

This chapter provides an overview of the Community Directory Search application in PeopleSoft Campus Self Service, and discusses how to:

- Generate community directories.
- Search community directories.

Understanding Self-Service Community Directory Search

The Community Directory Search self-service functionality enables you to provide searchable directories of members of your campus community online over the internet. Instead of exposing an entire list of people at your institution and having users load and search through it, you can make student, employee, or alumni directories available so users can search from smaller online lists and quickly locate individuals at your institution.

To set up PeopleSoft Community Directory Search, run the Community Directory Load process to generate a student, employee, or alumni directory. Specify the appropriate mass change definition for the directory to generate, and specify the type of data to include in that directory.

If a student places FERPA privacy restriction on a specific type of data for him or herself, the system will not expose that data in the online directory. Or, if the individual placed the restriction but chose to release it for inclusion in a specific publication, for example, the Student Directory, then even though the data can not be released elsewhere, the system displays it in the specified directory as indicated.

Generating Community Directories

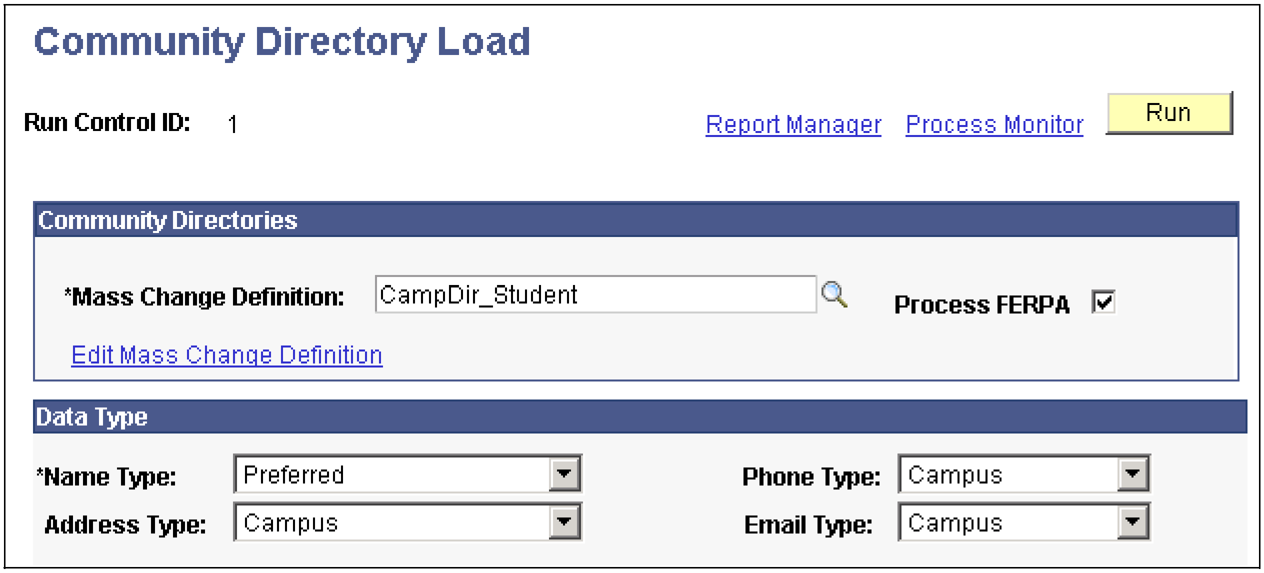
This section discusses how to generate online directories.

Page Used to Generate Community Directories

Page Name	***Definition Name***	***Navigation***	***Usage***
Community Directory Load	CAMPDIR_RUNCNTL	Set Up SACR, Product Related, Community Access/Directory, Community Directory Load	Generate online directories.

Generating Online Directories

Access the Community Directory Load page (Set Up SACR, Product Related, Community Access/Directory, Community Directory Load).



Community Directory Load page

Community Directories

Mass Change Definition Specify the mass change definition for the directory to generate. The following mass changes are delivered with your system:

CampDir_Alumni: Generates the Alumni Directory.

CampDir_Staff: Generates the Employee Directory

CampDir_Student: Generates the Student Directory

Process FERPA Select to apply the FERPA restrictions and release to publications options selected on the FERPA page, FERPA Quick Entry page, or the self-service Privacy Settings page in PeopleSoft Campus Self Service.

Edit Mass Change Definition Click to access the Mass Change Definition search page where you can select the mass change definition to edit or to regenerate.

Data Type

Select one or any combination of data types to include in the directory.

Name Type Select the type of name to include for individuals in this directory.

Address Type Select the type of address to include for individuals in this directory.

Phone Type Select the type of phone data to include for individuals in this directory.

Email Type Select the type of email address to include for individuals in this directory.

To keep your community directories up to date, run the process at least once a day. Always regenerate the mass changes prior to running the process.

Searching Community Directories

This section discusses how to:

- Specify the directory to search.
- Search the community directory.

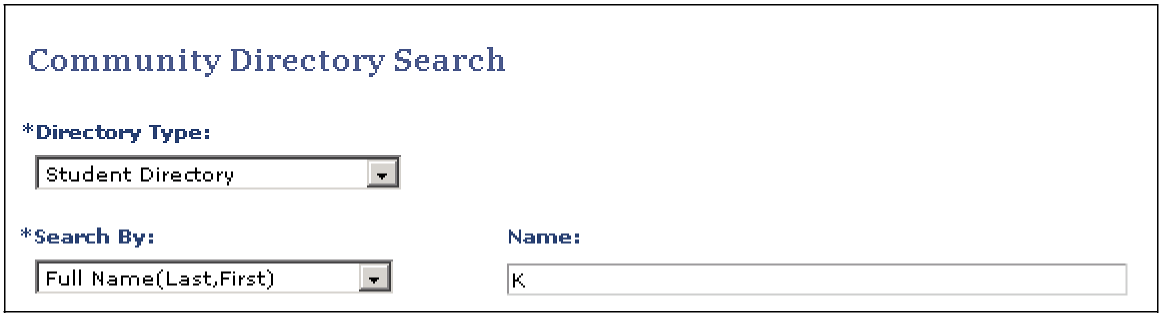
Pages Used to Search the Directories

Page Name	***Definition Name***	***Navigation***	***Usage***
Community Directory Search	SRCH_CD_TYPE	Self Service, Community Directory Search	Specify the community directory and criteria to search.
Community Directory for Students	SRCH_STDNT_CRIT	On the Community Directory page, select *Student Directory* and enter criteria for which to search.	View the search results obtained from the Student Directory and enter fields to perform a new search.
Community Directory for Employees	SRCH_STAFF_CRIT	On the Community Directory page, select *Employee Directory* and enter criteria for which to search.	View the search results obtained from the Employee Directory and enter fields to perform a new search.
Community Directory for Alumni	SRCH_ALUMN_CRIT	On the Community Directory page, select *Alumni Directory* and enter criteria for which to search.	View the search results obtained from the Alumni Directory and enter fields to perform a new search.
Student Profile	STDNT_PROF_SEC	Click the student's name on the Community Directory for Students page.	View data in the directory profile for that person.
Employee Profile	STAFF_PROF_SEC	Click the employee's name on the Community Directory for Employees page.	View data in the directory profile for that person.

Page Name	**Definition Name**	**Navigation**	**Usage**
Alumni Profile	ALUMN_PROF_SEC	Click the alumnus name on the Community Directory for Alumni page.	View data in the directory profile for that person.

Specifying the Directory to Search

Access the Community Directory Search page (Self Service, Community Directory Search).



Community Directory Search page

Directory Type

Select the directory type *(Alumni Directory, Staff Directory,* or *Student Directory)* to search.

Search By

Specify the criteria *(First Name, Full Name (Last,First),* or *Last Name)* by which to search.

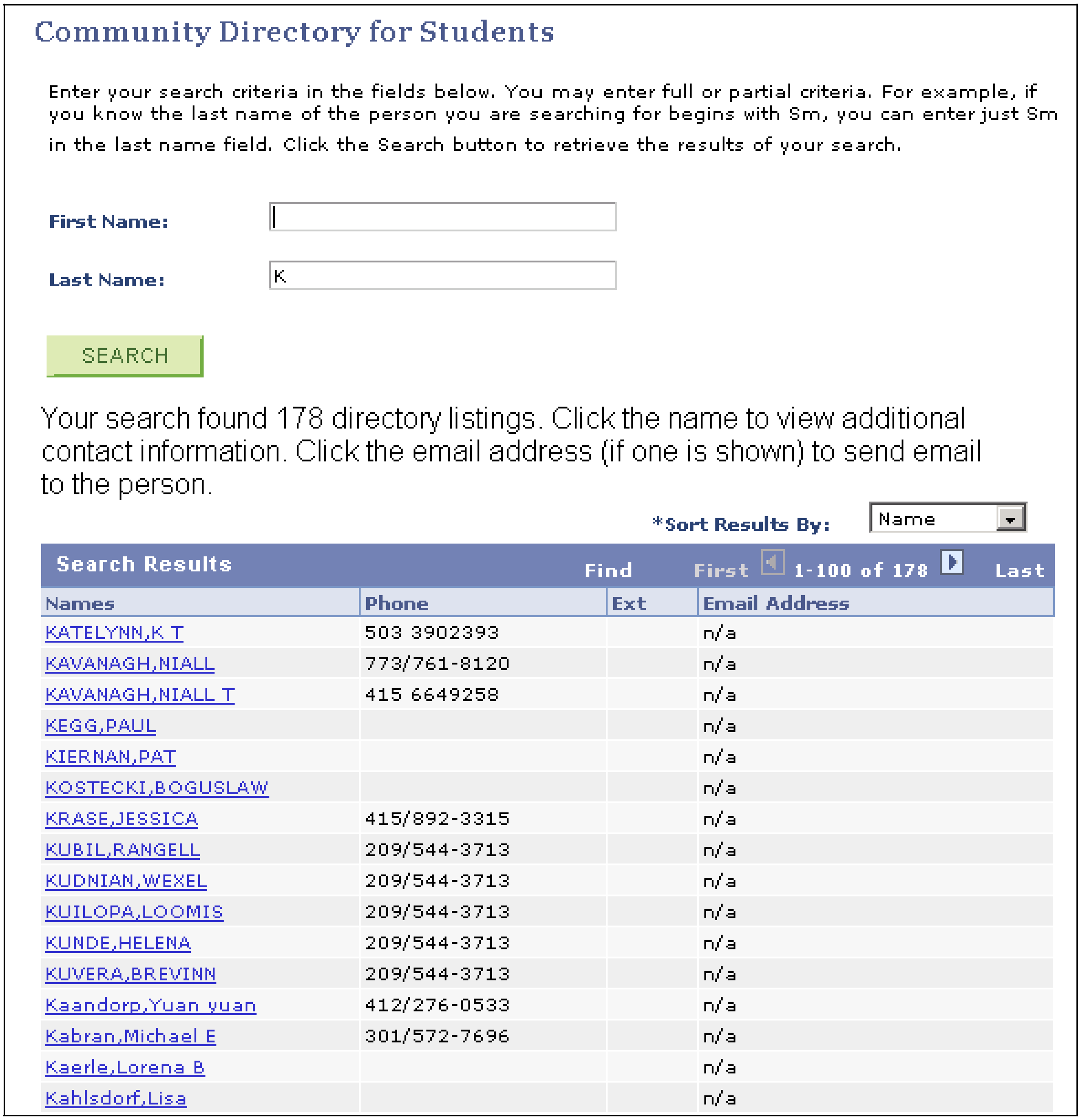
Specify one or more characters to use. For example, if you select *First Name* and enter only *S,* the system searches through the specified directory for all first names that begin with "S."

Search

Click to access the specified directory.

Searching a Community Directory

Access the Community Directory for Students (on the Community Directory page, select *Student Directory* and enter criteria for which to search, Community Directory for Employees (on the Community Directory page, select *Employee Directory* and enter criteria for which to search), or Community Directory for Alumni page (on the Community Directory page, select *Alumni Directory* and enter criteria for which to search).



Community Directory for Students

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with Sm, you can enter just Sm in the last name field. Click the Search button to retrieve the results of your search.

First Name:

Last Name: K

SEARCH

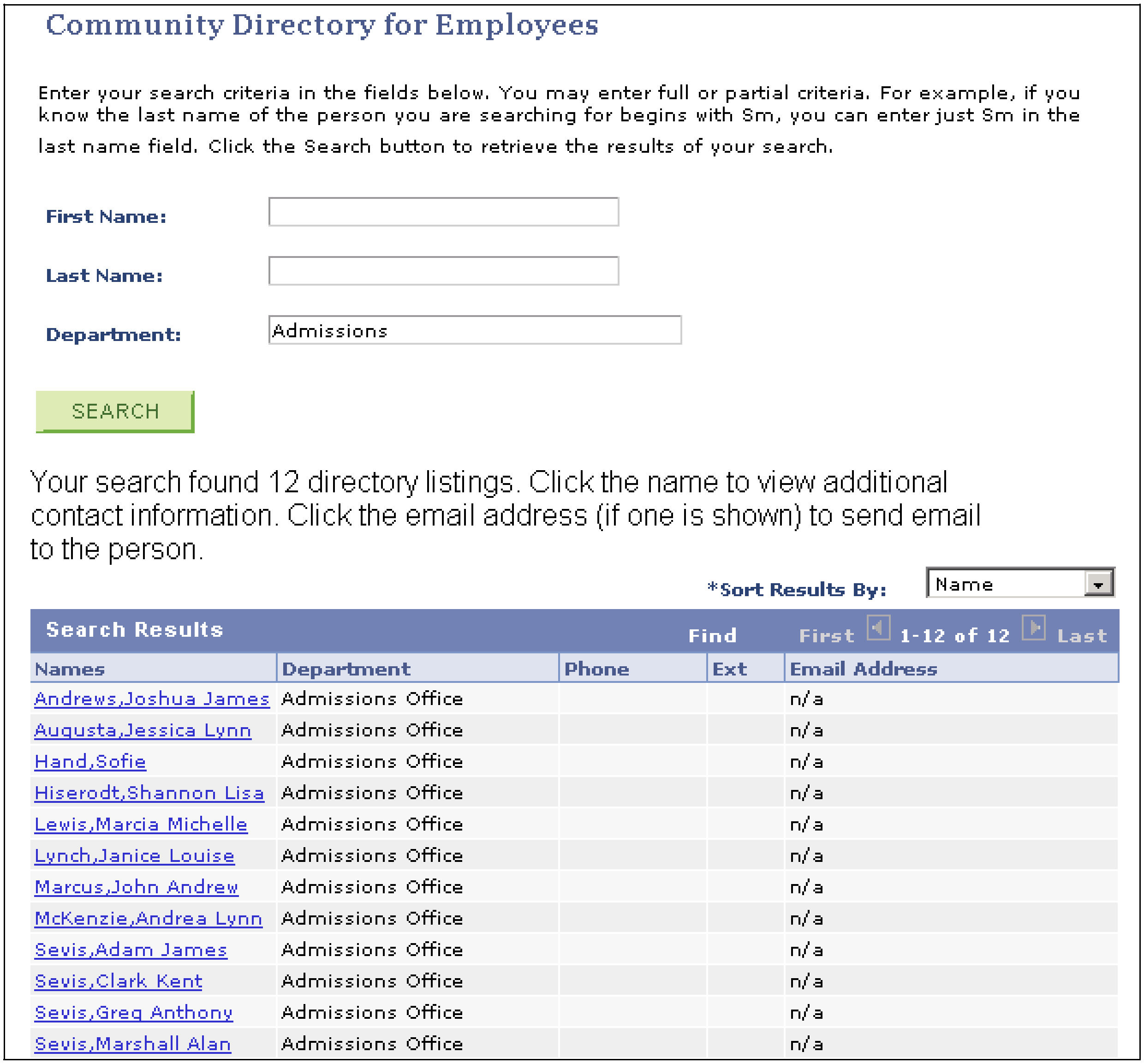
Your search found 178 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

*Sort Results By: Name

Search Results Find First 1-100 of 178 Last

Names	Phone	Ext	Email Address
KATELYNN,K T	503 3902393		n/a
KAVANAGH,NIALL	773/761-8120		n/a
KAVANAGH,NIALL T	415 6649258		n/a
KEGG,PAUL			n/a
KIERNAN,PAT			n/a
KOSTECKI,BOGUSLAW			n/a
KRASE,JESSICA	415/892-3315		n/a
KUBIL,RANGELL	209/544-3713		n/a
KUDNIAN,WEXEL	209/544-3713		n/a
KUILOPA,LOOMIS	209/544-3713		n/a
KUNDE,HELENA	209/544-3713		n/a
KUVERA,BREVINN	209/544-3713		n/a
Kaandorp,Yuan yuan	412/276-0533		n/a
Kabran,Michael E	301/572-7696		n/a
Kaerle,Lorena B			n/a
Kahlsdorf,Lisa			n/a

Community Directory for Students page



Community Directory for Employees

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with Sm, you can enter just Sm in the last name field. Click the Search button to retrieve the results of your search.

First Name:

Last Name:

Department: Admissions

SEARCH

Your search found 12 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

*Sort Results By: Name

Search Results Find First 1-12 of 12 Last

Names	Department	Phone	Ext	Email Address
Andrews,Joshua James	Admissions Office			n/a
Augusta,Jessica Lynn	Admissions Office			n/a
Hand,Sofie	Admissions Office			n/a
Hiserodt,Shannon Lisa	Admissions Office			n/a
Lewis,Marcia Michelle	Admissions Office			n/a
Lynch,Janice Louise	Admissions Office			n/a
Marcus,John Andrew	Admissions Office			n/a
McKenzie,Andrea Lynn	Admissions Office			n/a
Sevis,Adam James	Admissions Office			n/a
Sevis,Clark Kent	Admissions Office			n/a
Sevis,Greg Anthony	Admissions Office			n/a
Sevis,Marshall Alan	Admissions Office			n/a

Community Directory for Employees page

Community Directory for Alumni

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with Sm, you can enter just Sm in the last name field. Click the Search button to retrieve the results of your search.

First Name:

Last Name:

Class Year: 2001 (example: 1998)

SEARCH

Your search found 6 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

*Sort Results By: Name

Search Results Find First 1-6 of 6 Last

Names	Class Year	Phone	Ext	Email Address
Dorian Newton	2001			n/a
Jeremy Saxton	2001	514/345-7686		jjs@college.edu
Jonathan Silver	2001	512/444-3465		silver@hotmail.com
Robin Isenberg	2001			n/a
Shawn Gallegher	2001	818/963-1478		SGallegher@aol.com
Tina Graham	2001			n/a

Community Directory for Alumni page

Search Results

Names Click the individual's name to access the directory profile page for that person where you can view or edit profile data.

Email Address Click the individual's email address to send an email to that address.

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