

Oracle® Student System

User Guide

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Glossary

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Oracle Student System User Guide, Release 11i

Part No. B13574-01

Oracle welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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Preface

Welcome to the Oracle Student System User Guide, Release 11i.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Student System

If you have never used Oracle Student System, Oracle suggests you attend one or more of the Oracle Student System training classes available through Oracle University.

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See [Other Information Sources](#) for more information about Oracle Applications product information.

How To Use This Guide

The Oracle Student System User Guide contains the information you need to understand and use Oracle Student System. This guide contains twelve chapters:

- [Chapter 1](#) provides an overview of Oracle Student System.

- [Chapter 2](#) describes the tasks that you need to perform in the Inquiry subsystem to maintain prospect-related information.
- [Chapter 3](#) describes the tasks that you need to perform in the Admissions subsystem to maintain applications received during the admission period.
- [Chapter 4](#) describes the tasks that you need to perform in the Enrollment subsystem to manage all enrollment-related activities for students.
- [Chapter 5](#) describes the tasks that you need to perform in the Research subsystem to add and maintain information related to student research programs, scholarships, milestones, supervisors, and theses.
- [Chapter 6](#) describes the tasks that you need to perform in the Academic Records subsystem to maintain student academic records used to determine advanced standing, unit assessments, progression, and identify qualified graduates.
- [Chapter 7](#) describes the tasks that you need to perform in the Advising subsystem to create advising groups, match students to advisors, apply and release holds, and request degree audits.
- [Chapter 8](#) describes the tasks that you need to perform in the Student Finance subsystem to manage the financial transactions and accounting processes that determine student charges and credits for a specific study period.
- [Chapter 9](#) describes the tasks that you need to perform in the Financial Aid subsystem to manage financial aid including processing applications, awarding and disbursing awards, monitoring, and reporting.
- [Chapter 10](#) describes Oracle's student recruiting solution.
- [Chapter 11](#) describes the tasks that you need to perform in the Person subsystem in order to add and maintain records of users associated with the application.
- [Chapter 12](#) describes the tasks that you need to perform in the Correspondence subsystem in order to create and send correspondence items to students.

Each chapter has conceptual information about the subsystem and relevant tasks. Prerequisites and detailed steps are supplied when needed. Additional navigation-related information, system validations, and further guidelines are provided. Wherever dependencies exist, you are guided to other sections within the chapter, other subsystem chapters, or other books that provide more information.

This user guide contains the following appendices:

- [Program Structure and Planning History](#) describes how you can view history information within the Program Structure and Planning subsystem

- [Concurrent Process Procedures](#) details how to run concurrent processes, including single requests and request sets, schedule a concurrent process, and view log information
- [Common Terminology](#) describes technical terminology specific to Oracle Student System and discusses each term with industry-specific examples

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Student System.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation-** See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.

- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on *OracleMetaLink*.

Related Guides

Oracle Student System shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Student System.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Student System Implementation and Administration Guide

This guide describes provides setup information for Oracle Student System. Use this guide to set up values for codes, types, profile options, and institution information in Oracle Student System. This guide also provides information on integrations with other Oracle products and features.

Oracle Student System Open Interfaces User Guide

The Oracle Student System Open Interfaces User Guide provides information on importing data into and transferring data within Oracle Student System. You can also export data from Oracle Student System to another Oracle application or third-party software for processing and then import the processed data into Oracle Student System.

Oracle Self–Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self–Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

This user guide also contains references to the following Oracle publications:

- Oracle Student System for the United Kingdom User Guide
- Using Oracle HRMS - The Fundamentals (US)
- Managing People Using Oracle US Federal HRMS
- Configuring, Reporting, and System Administration in Oracle HRMS
- Multiple Organizations in Oracle Applications
- Oracle Applications Desktop Integrator User's Guide
- Oracle Marketing Implementation Guide
- Oracle Marketing User Guide
- Oracle Bill of Materials User's Guide
- Oracle iPayment Implementation Guide
- Oracle Payables User Guide
- Oracle Receivables User Guide
- Oracle General Ledger User Guide
- Oracle Inventory User's Guide
- Oracle Telesales Implementation Guide
- Oracle Telesales User Guide

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on *OracleMetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Student System implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Student System and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training

professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Student System working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With OracleMetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Alerts: You should check OracleMetaLink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Product Overview

Oracle Student System is a central management solution for institutions of higher education. It combines the functions and processes of individual departments into a single software application allowing for increased automation and productivity gains.

This chapter details the following topics:

- [Overview](#)
- [Integration with Other Products](#)
- [General Guidelines](#)

1.1 Overview

Oracle Student System encompasses institutional processes and functions including admissions and enrollments, fee assessment and financial aid, grading and examinations, graduation, and statistical reporting. You can maintain student information from an initial informational inquiry through program completion and graduation. This application provides an enterprise backbone that uses self-service, workflow, and automation to give users easy access to important records, information, and services.

This section details the following subsystems within Oracle Student System:

- [System Wide Services](#)
- [Program Structure and Planning](#)
- [Inquiry](#)
- [Admissions](#)
- [Enrollment](#)

- [Research](#)
- [Academic Records](#)
- [Advising](#)
- [Student Finance](#)
- [Financial Aid](#)
- [Student Recruiting](#)
- [Rules](#)

1.1.1 System Wide Services

System Wide Services provides the structural framework for Oracle Student System. Several of these subsystems consist entirely of setup.

Setup is discussed in detail in *Oracle Student System Implementation and Administration Guide*.

System Wide Services is composed of:

Person

Use the Person subsystem to add and maintain records of users including applicants, students, faculty, administrators, and other staff members. These person records are used across all Oracle Student System subsystems.

You can import person details from flat files provided by the government or third-party sources, such as recruitment agents.

This subsystem is also used to attach holds to students who do not satisfy administrative or academic requirements.

Calendar

Calendars are used to define data and trigger functions in other subsystems. You can define many types of calendars, each representing different time periods in the academic and administrative life of your institution.

Organizational Structure

You can set up departments, colleges, and schools within your institution. This setup is used throughout Oracle Student System.

Correspondence

Correspondence includes letters, brochures, and application forms for distribution to students, applicants, and prospects.

Correspondence items are set up in Oracle One-to-One Fulfillment and concurrent processes are then run to distribute them.

All interactions with students are recorded and administrators can view information including document name and type, date sent, program code, and award year applied for by the student.

Tracking

You can specify a set of steps or processes to monitor student progress, research students, and admission applications.

1.1.2 Program Structure and Planning

You can use the Program Structure and Planning subsystem to add and maintain details about program, program groups, units, unit sets, and unit sections.

Information from this subsystem is used by several other subsystems, such as Admissions, Advanced Standing, Assessments, and Financial Aid.

The Program Structure and Planning subsystem is discussed in detail in *Oracle Student System Implementation and Administration Guide*.

1.1.3 Inquiry

The Inquiry subsystem maintains information related to prospective students. You can manage all prospect details including requirements, preferences, employment, and test exemptions. Details are then processed to identify a prospect's personal, curricular, and extra-curricular requirements.

The subsystem allows you to create individualized information packages for prospects, addressing their specific needs.

You can also manage probability indices, which are calculated values indicating the likelihood of an individual or prospect applying and eventually enrolling.

1.1.4 Admissions

The Admissions subsystem is used to maintain applications received during the admission period. Using this subsystem, you can manage admissions-related

calendars and define admission procedures. You can also maintain admission inquiries and manage centralized government admissions procedures as well as student intake targets.

This subsystem maintains data related to courses that students have completed and the associated degrees and awards. Admissions also provides status checking for fee payments and waivers, entry qualifications, documentation requirements, and application outcomes.

You can generate admission statistics if required in accordance by government or oversight agencies.

1.1.5 Enrollment

Using Enrollment, you can manage all enrollment-related activities. The enrollment process begins in Admissions for new and returning students. Enrollment creates student enrollment records that include program, unit set, and unit attempts.

Enrollment processes include verification of student eligibility for both new and returning students and enforcement of academic and administrative holds.

This subsystem also manages changes to enrollment statuses arising out of intermissions or discontinuations.

If required, you can also create waitlists and set up priorities and preferences for enrolling from a waitlist.

Using self-service users can search for units, add or drop units, and view schedules, eligibility restrictions, special permissions, enrollment overrides, and timeslot assignments.

1.1.6 Research

The Research subsystem is used to manage research candidates. You can add and maintain information related to a student's research program, scholarship, milestones, supervisors, and theses.

You can also use Tracking to monitor research progress.

1.1.7 Academic Records

The Academic Record subsystem maintains student academic records in order to determine advanced standing, unit assessments, and progression, and to identify qualified graduates.

Academic Records is composed of:

Advanced Standing

With advanced standing, a student's prior course work is recognized by Oracle Student System as equivalent to units in the current program.

Academic Statistics

This subsystem is also used to track student progress. Student progress is measured using academic statistics that include several academic statistic types, such as attempted and earned credit points, GPA, quality points, and GPA credit points.

Progression

You can define progression rules to track student performance and program completion rules that students must satisfy in order to be eligible for graduation.

Assessments

You can set up and manage academic evaluation of exams, papers, and coursework throughout the term.

Graduation

In this subsystem, you can create graduation ceremonies by setting up and managing details such as cap and gown measurement and ceremony location.

Order Documents

On program completion, students can order transcripts and enrollment certificates through self-service.

Degree Audit

You can analyze student progress towards meeting degree requirements using degree audit. Oracle Student System integrates with third-party software to provide degree audit and what-if reports.

1.1.8 Advising

The Advising subsystem is used to create advising groups, match students to advisors, apply and release holds, and request degree audits. The Advising functionality is available only in self-service.

1.1.9 Student Finance

The Student Finance subsystem manages all financial transactions and accounting processes that determine student charges and credits for a specific study period. Major functionality includes the assessment of tuition and fees, payments and deposits received from students and sponsors, and disbursements from the Financial Aid subsystem.

Using the fee assessment procedure, you can calculate student fees based on the student's enrollment status and the number of programs in which the student is enrolled.

This subsystem is also used to maintain all sponsorship-related information.

Using payment plans, students can pay charges in installments. If a student fails to pay an installment by the specified due date, finance and late charges are levied. Student Finance offers several payment modes, including over-the-counter payments, mail-in, and self-service payments. For all payments, Student Finance generates the appropriate receipts, billing extracts, and refunds.

1.1.10 Financial Aid

Use the Financial Aid subsystem to manage the broad spectrum of financial aid related activities. This includes processing applications, determining eligibility, awarding and disbursing funds, and reporting data. Depending on the funds awarded, institutions can interact with the Common Origination and Disbursement (COD) system, third-parties, and external processors.

Using the subsystem, institutions can award, monitor, and manage all forms of financial aid, including Pell Grants, loans, sponsorships, and student employment. The subsystem is extremely flexible and can be configured to meet your particular financial aid processing requirements.

1.1.11 Student Recruiting

Oracle Student System works with the Oracle Sales and Marketing products to target and provide one-to-one marketing to prospective students. The marketing and sales applications allow you to create target lists and personalized marketing messages, maintain deadlines, and organize on or off campus events.

1.1.12 Rules

Rules govern the behavior of Oracle Student System. You can modify some seeded rules to adapt to your business practices.

Rules discussed in detail in *Oracle Student System Implementation and Administration Guide*.

1.2 Integration with Other Products

Oracle Student System can be used with several other products to offer more powerful and effective solutions.

Student Finance can use *Oracle General Ledger*, *Oracle Receivables*, and *Oracle Payables* to maintain financial data and carry out account management activities, such as billing.

Oracle Marketing allows you to plan, execute, and manage marketing campaigns.

Oracle Trading Community Architecture (TCA) is a data model used to store business information, including people, places, organizations and the relationships between them. It serves as a common repository for people and organization related information across all Oracle Applications.

Oracle Telesales helps you manage communication with target groups through the telephone. A contact profile is always updated in real time, therefore keeping all information current.

The Correspondence subsystem works with tools such as *Oracle One-to-One Fulfillment* and *Oracle Customer Interaction History* to set up, dispatch, and track correspondence items.

Oracle Student System can also be integrated with *Oracle Human Resource Management Systems* or *Oracle Payroll*. If integrated, the Financial Aid subsystem allows the processing of payroll details and maintenance of human resource records for students awarded employment. In addition, you can easily export employment data to off-campus human resource systems.

1.3 General Guidelines

1.3.1 Responsibility

Unless otherwise noted, the required responsibility for performing the tasks detailed in this guide is Oracle Student System Super User.

Many organizations will have additional responsibilities available for individuals maintaining or working in specific subsystems. Check with your System Administrator if you have any questions.

1.3.2 Navigation

Navigation paths in this guide are for the product as shipped, and do not reflect any customization. If responsibilities are changed after installation, the navigation paths may vary from those mentioned in this guide.

1.3.3 Data Coordination

Some windows have a *header region* and a *details region*. Select the Data Coordination check box to automatically populate, refresh, and coordinate data in the details region with the header region.

If deselected, data in the details region is refreshed only if the user navigates to the appropriate field.

Leave this check box deselected in order to speed up retrieval of records while querying data.

1.3.4 Save Step

To save your work, use the following:

File > Save or **File > Save and Proceed**

1.3.5 Parent-Child Relationships

Closing a parent record will not close the associated child record(s). Every child record must be closed manually.

For example, an institution has originally defined program types (parent) and programs (children) as described in the following table:

Table 1–1 Parent-Child Relationship Example

Admission Category (parent)	Admission Process Category(child)
Graduate	Graduate/Program Admission Process

When you close the Admission Category:Graduate(parent) record, you must close the Admission Process Category:Graduate/Program Admission Process(child) record.

You must close all the child records of the Admission Category:Graduate parent record. Closing a parent record will not close the associated child record(s).

The Inquiry subsystem manages inquiries received from prospective students. This includes recording prospect details and providing prospects with the information relevant to the educational institution.

This chapter details the following topics:

- [What's New in This Release](#)
- [Inquiry Overview](#)
- [Managing Inquiries](#)
- [Importing Information](#)

2.1 What's New in This Release

In this release, Oracle Student System has the following new and modified features:

- [Displaying Inactive Applicant Status](#)
- [Navigating Directly to Tasks in Self-Service](#)
- [Entering Inquiries in Self-Service](#)
- [Reviewing Person Summary](#)

2.1.1 Displaying Inactive Applicant Status

Person records can be inactivated in the Trading Community Architecture (TCA). If such individuals are queried in Oracle Student System for transactions, their inactivated status is now displayed in the Record Admission Inquiries window and in the Applicant search self-service page.

2.1.2 Navigating Directly to Tasks in Self-Service

Self-service is now organized to enable a recruiter or an inquirer to directly navigate to the relevant tasks.

For a recruiter with the **Oracle Student System Administrative Recruiter Self-Service** responsibility, these include checking notification and alerts, viewing or creating person ID groups, entering personal information, and entering information on a prospect.

An inquirer can log on to self-service with the **Oracle Student System Guest Self-Service** responsibility and register as a user, retrieve password, and enter inquiries.

2.1.3 Entering Inquiries in Self-Service

There are different sources from where inquiries are collected and processed.

2.1.3.1 Entry by Recruiters

Recruiters on the move can now enter inquiry information quickly and easily using self-service. Recruiters can click the Prospect Inquiry Quick Entry link to enter inquiries and view, edit or delete inquiries. Inquiries that have not been processed will be displayed for the recruiter. A new inquiry can be created by clicking the Create Prospect Inquiry button.

2.1.3.2 Creating a Prospect's Inquiry

The recruiter can create a new inquiry and enter information collected from various sources in the Create Prospect Inquiry page.

If the prospective student has not provided an institution name which must be entered as part of the projected graduation year information, recruiters must create a dummy institution with a value **Unknown** before starting the entry. The projected graduation year helps marketing and sales professionals contact the prospect at the appropriate time. For example, if the projected graduation year for a prospect is 2009, it would be inappropriate to contact the prospect in 2004.

2.1.3.3 Updating the Prospects Inquiry

Recruiters can update an inquiry by clicking the Update icon in the Prospect's Inquiry Information page.

2.1.4 Reviewing Person Summary

Recruiters and administrators can view an individual's progress from a prospect to a lead, and finally to an applicant. Recruiters can view a prospective student's academic history, test scores, interests, and personal information using self-service.

2.2 Inquiry Overview

The recruiters of an educational institution often travel to various places where they participate in, organize, and manage student fairs, campaigns, and events. During these types of events, they identify prospects, and acquaint the prospects with the courses and facilities that the institution provides.

Recruiters invite, and register the prospect for upcoming campaigns and events. At these events, they have prospects fill out inquiry cards with information about themselves, the courses and subjects that they are interested in, and their plans for future studies.

A prospect can also log on to self-service as a guest and post inquiries to the educational institution. No matter what the source of inquiry or the method used, all inquiry and prospect information must be entered into Oracle Student System tables before administrators can process them. Recruiters and administrators can also manually enter information for each prospect.

The information is then processed to identify the personal, curricular, and extra-curricular needs of the prospect. For example, the prospect may be a foreign student who would require extra classes in English.

As a result of processing, a package is formed containing both general information and specific information that meets prospect needs. Depending on availability of information such as brochures, catalogs, and lists, the package is mailed to the prospect.

2.3 Managing Inquiries

Inquiries may come from prospective students through self-service, an agency, over the telephone, by mail, or directly at the educational institution. A prospect may request information about one or several programs, and about unit sets in the programs. Inquiries for programs can be for different entry levels. For example, an inquirer may have completed two years of a graduate History program, discontinued, and wish to return after a break of several years to complete the program.

Inquiry statuses indicate the progress of inquiry processing. An inquiry is first **Received**, then **Acknowledged** when processed, and finally **Completed** when all the items requested are mailed to the inquirer as a package or collateral, completing the inquiry.

An inquiry package consists of *items of information*. Items in a package may be flyers and brochures. Administrators process an inquiry for entry statuses, programs, unit sets, and information types to identify possible package items. Entry status is the level of education being inquired about such as freshman, graduate, professional, or research.

Information types are mapped to *package items*. To avoid any repetition of package items, they are mapped to an entry status, to programs for this entry status, and further to unit sets in each of the programs. This is known as *package item reduction*.

Inquiry characteristics can also influence a package's constituents. Inquiry characteristics can be related to the inquirer or to the program. For example, a package for a returning student would differ from that for an international prospect or a senior citizen. A package for an international prospect would have different tuition fees, room tariff, advanced standing, programs, and unit sets offered than those for a domestic prospect. Similarly an inquiry for honors, for a transfer, or for a re-admit would have different packages.

The inquiry process comprises of the following tasks:

- [Entering Inquiries](#)
- [Selecting Package Items](#)
- [Processing Inquiries](#)

2.3.1 Entering Inquiries

You can enter inquiries using the Record Admission Inquiries window. For inquiries entered in self-service and those from other sources, run the Admission Import Process concurrent process, with the correct source type selected, to import the information. For information on importing inquiries, refer to [Importing Information](#).

Entering inquiries involves:

- [Creating an Inquirer](#)
- [Creating Inquiries](#)
- [Entering Prospect Details](#)

- [Recording Prospect Probability](#)
- [Entering Academic Preferences](#)
- [Recording Inquiry Characteristics](#)
- [Entering Additional Inquiry Details](#)

Prospects may have applied for financial aid before making an inquiry. In such cases, the Financial Aid subsystem checks to see if inquiries exist for these students and if not, creates new inquiries while importing financial aid applications from Institutional Student Information Report (ISIR) and College Scholarship Service (CSS) files. For more information, see [Processing Applications](#) in Financial Aid.

A prospect may submit multiple inquiries. Each inquiry is assigned a system-generated inquiry number. An inquiry consists of two parts, information about the prospect and inquiry details such as inquiry date, admission term, inquiry method, entry status (graduate, freshman or undergraduate, transfer), and entry level or program year (first, second or third).

2.3.1.1 Creating an Inquirer

A person record must be created for the inquirer, before an inquiry can be entered.

Navigation

Student Recruiting > Record Inquiries

Additional Notes

- Enter the name, sex, and date of birth in the Record Admission Inquiries window.
- On saving, Oracle Student System generates and displays the unique person number and assigns the person type of **Other** to the inquirer. For more information on person types, see [Person Details](#) in Person.
- Use the appropriate buttons in the Record Admission Inquiries window to enter academic details about the inquirer such as credentials, interests, activities, admission test scores, previous academic programs, and academic honors, if any. For more information on how to enter the academic information, see [Creating an Applicant Record](#) in Admissions.
- Click **Person Detail** in the Record Admission Inquiries window to enter further prospect information, such as contact details and ethnicity. For more information on how to enter person details, see [Person Details](#) in Person.

2.3.1.2 Creating Inquiries

You can record when and how the inquiry was received, and the term and entry level inquired about. For example, the inquiry may have been received directly at the admissions office, over the phone, or by e-mail.

The prospect can be interested in applying for a specific admission term and joining the first or final year of a course.

Inquiry statuses are used to track an inquiry to closure. For information on closing inquiries, refer to [Processing Inquiries](#).

Prerequisites

Entry levels, inquiry methods, and inquiry statuses are defined.

Inquiry statuses are mapped to the system inquiry statuses.

Navigation

Student Recruiting > Record Inquiries

Steps

1. Query an inquirer in the Record Admission Inquiries window.
2. In the Inquiry Instance region, select the inquiry status of **Received**.
3. Enter the date when the inquiry was received and select the manner in which it was received, if electronically, by post, or by hand.
4. Optionally, select the term inquired about, and the entry level the inquirer is interested in. Entry level can be the first year or the final year of a course.
5. Click **Comments** to enter additional notes or remarks on the inquiry.
6. Save your work.
7. If a second inquiry with different details is received from the same inquirer, follow steps 1-5 in the next row.
8. Save your work.

Additional Notes

On saving the inquiry, a funnel status is assigned to the inquirer. The funnel status indicates whether a potential applicant is identified as a prospect, initiated an inquiry, or was contacted by the educational institution. In addition, the person type of **Prospect** is assigned to the inquirer.

2.3.1.3 Entering Prospect Details

You can enter details on a prospect's academic history, requirements and preferences, placement test subjects if exempted from any, and statistics on the prospect's secondary school. Enter also the reason and level of interest the prospect holds with the educational institution.

Prerequisites

The recruitment code classes of institution control, institution setting, institution size, institution location, secondary school location, previous subject of study, test exemption, prospect special interest, employment, housing, program interest, degree awarded, special services, unit sets, and certainty of choice are defined.

Navigation

Student Recruiting > Record Inquiries

Steps

1. Query a prospect in the Record Admission Inquiries window.
2. Click **More** and then click **Recruitment**.
3. In the Prospect tab, enter the reason for the special interest of the educational institution in the prospect and priority of the prospect.
4. Optionally, enter the religion of the prospect.

You can enter the religion of the prospect only if the **IGS: Decides whether the Religion Tab has to be Displayed** profile option is set to the default value of **Yes**.

5. Select the Very Important Person check box if the institution is keen on recruiting the prospect.
6. Select the Deactivate Recruit Status check box when the prospect is no longer interested in your institution.
7. In the Other Interests tab, enter the prospect's preference of program and institution's location, size, setting, and control.
8. In the Requirement tab, enter requirements of the prospect such as housing, employment, goals, unit sets, and the prospect's confidence in being offered the unit sets of interest.
9. In the Past History tab, enter the subjects studied, the duration of study, and specify whether any honors were achieved.

10. In the Advanced Placements tab, select test segments or subjects that the prospect was exempted from.
11. In the Secondary School tab, enter the school statistics of the prospect. These include the number of advanced studies and honors classes the school offered, the average class size, the location of the school, and the percentage of students who pursued higher education.
12. In the Probability Index tab, enter probability values. For more information on probability, refer to [Recording Prospect Probability](#).
13. Save your work.

2.3.1.4 Recording Prospect Probability

The probability index of a prospect indicates the possibility of a prospect applying and finally enrolling as a student of the educational institution. This is used by interviewers, evaluators, and decision makers to help rate applications, and make interview decisions and offers.

The educational institution can either outsource the calculation of probability indices and enter the values manually for each prospect or import the values using the Import Probability Values concurrent process for a group of prospects from the interface tables.

Prerequisites

Probability code classes of type and source are defined.

Navigation

Student Recruiting > Record Inquiries > More > Recruiting

Additional Notes

In the Probability Index tab of the Recruitment window, select the probability type, calculation date, value and source.

2.3.1.5 Entering Academic Preferences

You can record the academic preferences of an inquirer for a program, program level, and unit sets.

Prerequisites

Inquiry entry statuses are defined and mapped to test type, organizational units, source type, institution type, programs and unit sets, package item reduction, and e-mail for self-service.

Navigation

Student Recruiting > Record Inquiries

Steps

1. Query an inquirer in the Record Admission Inquiries window.
2. Select the inquiry for which programs and unit sets are to be identified and click **Academic Interests**.
3. In the Inquiry Academic Interests tab of the Academic Interests window, select the programs and unit sets in a program that the inquirer is interested in. If indicated, enter the order of preference for these programs.
4. Enter for each program, the educational entry status sought, such as freshman, graduate, or research.
5. Save your work.
6. Return to the Record Admission Inquiries window, select the next inquiry and repeat steps 3 to 5.
7. Save your work.

Additional Notes

Click the All Inquiry Academic Interests tab in Academic Interests window to view:

- Programs and unit sets inquired about
- Entry statuses and preferences of the inquirer for the given programs and unit sets

2.3.1.6 Recording Inquiry Characteristics

You can enter characteristics that are specific to an inquiry. For example, the inquirer may be physically challenged, may want to improve job skills, or may be interested in an honors program. These characteristics are used in identifying and adding the required items of information to the information package. Subsequently, this information package is sent to the inquirer. For example, if the inquirer is an

international prospective student, the inquiry information package would probably include a language course that needs to be taken.

Prerequisites

Inquiry characteristic types are defined.

Navigation

Student Recruiting > Record Inquiries

Steps

1. Query an inquirer in the Record Admission Inquiries window.
2. Select the inquiry for which characteristics are to be defined and click **Characteristics**.
3. In the Inquiry Characteristic Types tab of the Inquiry Characteristic Types window, select the nature of the inquiry such as honors, transfers, or re-admit. This can also be related to the characteristics of the inquirer who may be a foreign prospective student, belong to a minority ethnic group, or be physically challenged.
4. Save your work.
5. If the inquirer has more than one inquiry, select the next inquiry in the Record Admission Inquiries window and repeat steps 3 and 4.

Additional Notes

Click the All Inquiry Characteristic Types tab in Inquiry Characteristic Types window to view the characteristics of each of the inquiries.

2.3.1.7 Entering Additional Inquiry Details

You can enter further details about the inquirer with respect to the inquiry such as the inquirer's career goal, schools of interest, and individuals who may have influenced the inquirer.

Prerequisites

Schools, and inquiry detail codes of information source and roles of possible influential persons are defined.

Campaigns and events are defined.

Navigation

Student Recruiting > Record Inquiries

Steps

1. Query an inquirer in the Record Admission Inquiries window.
2. Select the inquiry for which inquiry details are to be entered and click **More Details**.
3. In the Inquiry Details tab of the More Details window, enter the inquirer's educational goal, school of interest, and the campaign or event that the inquirer participated in.

These details are displayed in the All Details tab for each of the inquiries.

4. Optionally, enter the source from where the inquirer came to know of the educational institution and the individual who influenced the prospect to inquire about the institution.
5. Optionally, enter the name and number of the person registering the inquiry.
6. Save your work.
7. If the inquirer has more than one inquiry, select the next inquiry record in the Record Admission Inquiries window and repeat steps 3 to 6.

Additional Notes

Click the All Details tab in More Details window to view the educational goal of the inquirer, the school that the inquirer is interested in, and the campaign or event that the inquirer participated in for each of the inquiries.

2.3.2 Selecting Package Items

Inquirers request information. The information is divided into package items. Administrators must identify all the package items for each inquiry. If multiple inquiries from an inquirer are received at the same time, a final package for mailing from each individual inquiry can be made. For information on setting up inquiry package items, see *Oracle Student System Implementation and Administration Guide*.

Use the Package Items window to select package items based on the unit sets and programs mapped to an entry status. If package item reduction has been carried out, there will be no duplication in the information package sent out.

Prerequisites

Package items are defined and mapped to defined information types.

Entry statuses, programs and unit sets for an inquiry are selected.

Package items are reduced by mapping them to an entry status, programs for that entry status, and further to unit sets in each of the programs.

Navigation

Student Recruiting > Record Inquiries

Steps

1. Query an inquirer in the Record Admission Inquiries window.
2. Select the inquiry for which academic package items are to be identified and click **Package Items**.
3. In the Inquiry Package Items tab of the Package Items window, select the required package items from the list. The list displays package items associated with the entry status, program, and unit set given in the Academic Interests window.

If the entry status is set to **No Reduction** in the Inquiry Entry Statuses window, all package items for the entry status, program, or unit set given in the Academic Interests window are displayed.
4. Save your work.
5. If the inquirer has more than one inquiry, select the next inquiry in the Record Admission Inquiries window and repeat steps 3 and 4.

Additional Notes

Click the All Inquiry Package Items tab in Package Items window to view all the package items for an inquirer.

2.3.3 Processing Inquiries

After package items for each inquiry have been selected and identified, the inquiries are processed. Mailing all package items to the prospects completes processing and closes inquiries.

In Oracle Student System, inquiries can have any of the following statuses:

- **Received:** On receipt and entering of inquiry.

- **Acknowledged:** On mailing of package items available.
- **Complete:** On mailing of all package items and closing of inquiry.

You can manually process each inquiry in the Record Admission Inquiries window, or run the Process Admission Inquiry concurrent process to process a group of inquiries.

Processing inquiries involves:

- [Completing Inquiries](#)
- [Identifying Inquiries with Unavailable Package Items](#)
- [Completing Inquiries with Unavailable Package Items](#)
- [Generating Address Labels](#)

2.3.3.1 Completing Inquiries

Run the Process Admission Inquiry concurrent process to complete a group of inquiries and update the inquiry statuses. The Process Admission Inquiry concurrent process:

- Retrieves all inquiry records with inquiry status of **Received** and **Acknowledged**
- Checks for availability of package items not sent
- Sends the package items
- Updates the inquiry status to **Closure** or **Completion**
- Updates the Last Processing Date field in the Record Admission Inquiries window

The Process Admission Inquiry concurrent process can be run by an Admissions Officer nightly during busy inquiry periods, and weekly throughout the rest of the year. This concurrent process can only be run in batch mode.

The Inquiry Package Status Report and the Person Address Labels concurrent processes are run after Process Admission Inquiry concurrent process is run.

- The Inquiry Package Status Report concurrent process generates the details of each inquiry record and the available and unavailable package items.
- The Person Address Labels concurrent process generates the address labels that are required to mail the inquiry packages.

The Process Admission Inquiry concurrent process does not produce an exception report, however, the number of records processed and the ID group number of the person ID group created can be viewed in the run log file.

Prerequisites

Package items and their availability are defined.

Inquiry processing statuses are defined.

Navigation

Student Recruiting > Record Inquiries

Steps

1. Query the inquirer in the Record Admission Inquiries window.
2. Select the inquiry for which package items are to be mailed and click **Package Items**.
3. For each inquiry package item in the Package Items window, check the availability from the effective from and to dates. If items are available, enter the date when the item has to be mailed.
4. Save your work and return to the Record Admission Inquiries window.
5. If all the package items of the inquiry are available and if you have entered mailing dates for all of them, update the inquiry status to **Complete** in the Record Admission Inquiries window.

However, if some items are unavailable and cannot be mailed, set the inquiry status to **Acknowledged**.

6. Save your work.

You can complete a group of inquiries from different inquirers by running the Process Admission Inquiry concurrent process.

Prerequisites

Package items and their availability are defined.

Inquiry processing statuses are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Process Admission Inquiry concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Process Admission Inquiry concurrent process parameters.

Table 2–1 Process Admission Inquiry Parameters

Parameter	Description
Status to be Processed	Select to process registered inquiries, acknowledged inquiries or both. If you do not enter a value, both acknowledged and registered inquiries are processed.
Process Inq when no PKG items	Inquiries for which all package items are unavailable will not be processed, by default. Select Yes to notify inquirer of unavailability of package items and of approximate mailing date.
Process Inq when PKG incomplet	Inquiries with unavailable package items will not be processed, by default. Select Force Processing of Incomplete Package check box in the Record Admission Inquiries window and select Yes to forcefully process these inquiries to completion.
Person Responsible for the PIG	Enter the person number of the individual responsible for person ID group
Pers to assume ownrship of PIG	Enter the person number of the individual who can run the Inquiry Package Status Report and Person Address Labels concurrent processes for the person ID group. The current user is taken by default. Security access to the group cannot be granted to a user through the Person ID Group Definitions window. The database administrator must grant security access.
Inquiry Method	Select a method to restrict the processing of inquiries by their inquiry method.
Inquiry Entry Status	Select an entry status to restrict the processing of inquiries by their inquiry entry status.
Inquiry Date Low	Select a date to restrict the processing of inquiries received after a particular date.

Table 2–1 (Cont.) Process Admission Inquiry Parameters

Parameter	Description
Inquiry Date High	Select a date to restrict the processing of inquiries received before a particular date.
Inquiry Information Type	Select an information type to restrict the processing of inquiries by their inquiry information type.

2.3.3.2 Identifying Inquiries with Unavailable Package Items

Run the Inquiry Package Status Report concurrent process to generate person IDs for all inquiries and find inquiries that have unavailable package items.

The person IDs are required to generate address labels for a group of inquirers who will be sent packages.

This concurrent process generates a report that displays for a person ID the package status in terms of the availability or unavailability of package items. Information in this report is used to assemble inquiry packages. You must first run the Process Admission Inquiry concurrent process to generate the person IDs required to run the Inquiry Package Status Report concurrent process.

The Inquiry Package Status Report concurrent process displays each person from the ID group along with the following:

- Address details
- Inquiry characteristics
- Available package items
- Unavailable package items

Prerequisites

Package items and their availability are defined.

Inquiry processing statuses are defined.

Process Admission Inquiry concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Inquiry Package Status Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Inquiry Package Status Report concurrent process parameters.

Table 2–2 Inquiry Package Status Report Parameters

Parameter	Description
Runtime Comment	Enter the free format text to appear as a comment in the report header.
Person ID Group	You must select the person ID group that the process will report on inquiry package status. If the Process Admission Inquiry concurrent process is not run, no person ID group is created, and no person ID group can be selected in this report.

2.3.3.3 Completing Inquiries with Unavailable Package Items

To close inquiries for which package items are unavailable:

- Select the Force Processing of Incomplete Package check box in the Record Admission Inquiries window.
- Then, run the Process Admission Inquiries concurrent process again with the parameter for Process Incomplete Packages set to **Yes**.

The concurrent process retrieves the inquiry records and updates the status to **Complete** despite inquiries having unavailable package items.

Prerequisites

Package items and their availability are defined.

Inquiry processing statuses are defined.

Navigation

Student Recruiting > Record Inquiries

Steps

1. Query the inquirer in the Record Admission Inquiries window.

2. Select the inquiry which is to be closed despite unavailable package items and click **Package Items**.
3. For each inquiry and inquiry package item, check their availability from the effective from and to dates. If items are still unavailable, select the Set All Unsent Items as Mailed check box.
4. Save your work.
5. Enter a mailing date for every unavailable package item.
6. Save your work.
7. After entering mailing dates for every unavailable package item, return to the Record Admission Inquiries window and change the inquiry status to **Complete**.
8. Save your work.
9. To complete a group of inquiries with unavailable package items across various inquirers, query the inquirers one by one in the Record Admission Inquiries window.
10. For each inquirer, select the Force Processing Of Incomplete Package check box and save your work.
11. Run the Process Admission Inquiry concurrent process again. Set the Process Incomplete Packages parameter to **Yes**.

For more information on the parameters for Process Admission Inquiry concurrent process, refer to [Completing Inquiries](#).

2.3.3.4 Generating Address Labels

The Person Address Labels Report concurrent process generates person address labels that can be used to mail inquiry packages to individuals in a person ID group.

Prerequisites

Package items and their availability are defined.

Inquiry processing statuses are defined.

Process Admission Inquiry concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Person Address Labels concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Person Address Labels concurrent process parameters.

Table 2–3 Person Address Labels Parameters

Parameter	Description
Runtime Comment	Enter the free format text to appear as a comment in the report header.
Person ID Group	Select the person ID group for which the person address labels should be generated. If the Process Admission Inquiry concurrent process is not run, no person ID group is created, and no person ID group can be selected.

2.4 Importing Information

Administrators run the Admission Import Process concurrent process to import data on prospects from external sources to Oracle Student System. These may include details on prospective students purchased by the educational institution, received through inquiries from third-party sources, or from information entered by inquirers in self-service.

If a guest using the **OSS Guest Self-Service** responsibility enters inquiries in self-service, the information is first stored in temporary tables. You need to run the Import Self-Service Inquires concurrent process to transfer this information to the interface tables. Then, run the Admission Import concurrent process to transfer the information to Oracle Student System.

If a Recruiter or Administrator enters inquiries in self-service, the information is stored in the interface tables. Run the Admission Import Process concurrent process to transfer the information to Oracle Student System.

For more information on the Admission Import Process concurrent process, see [Importing Admission Information](#) in Admissions.

Importing inquiries involves:

- [Importing Self-Service Inquiries to Interface Tables](#)
- [Importing Self-Service Inquiries to Oracle Student System](#)
- [Identifying Errors in Inquiry Import](#)

2.4.1 Importing Self-Service Inquiries to Interface Tables

Inquiries that are entered in self-service are stored in temporary tables. This information must be moved to the interface tables before being finally imported to Oracle Student System tables.

Run the Import Self-Service Inquiries concurrent process to transfer data from the self-service temporary tables to the interface tables.

You can also run this concurrent process from self-service.

Prerequisites

Inquiries are entered in self-service.

Inquiry entry statuses are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Import Self Service Inquiries concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Import Self Service Inquiries concurrent process parameters.

Table 2–4 Import Self Service Inquiries Parameters

Parameter	Description
Inquiry Entry Status	Select the entry status of the inquiries that the process must transfer from the self-service temporary tables to the interface tables.
Inquiry Application Start Date	You can import inquiries for a specific period. Enter the start date for this period.

Table 2–4 (Cont.) Import Self Service Inquiries Parameters

Parameter	Description
Inquiry Application End Date	Enter an end date to denote the end of the period. This date should be greater than or equal to the start date specified.

2.4.2 Importing Self-Service Inquiries to Oracle Student System

Use the Admission Import Process to import inquiries from interface tables to Oracle Student System. Set the source type to Prospect Self Service Web Inquiry.

For information on the Admission Import Process concurrent process, see [Importing Admission Information](#) in Admissions.

2.4.3 Identifying Errors in Inquiry Import

Run the Import Process Inquiry Details Report concurrent process to check the details of inquiries that were not successfully imported.

The report generated by the concurrent process displays inquiry information for all the records imported by the last run of the Admission Import Process concurrent process. You can choose the level of details reported and the type of information included in the report by setting the appropriate parameter values.

Prerequisites

Interface tables are populated with inquiries.

Batch IDs are provided for the group of inquiries.

Source types are defined and mapped to the system source type of Prospect Self Service Web Inquiry.

Source categories are defined for the source types.

Discrepancy rules are defined for the source categories.

Match criteria sets are defined for the source types.

The Admission Import Process concurrent process is run with the source type set to Prospect Self Service Web Inquiry.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Import Process Inquiry Details Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the Import Process Inquiry Details Report concurrent process parameters.

Table 2–5 Import Process Inquiry Details Report Parameters

Parameter	Description
Report Type	If you do not select a value for the level of detail that the report must display, all details will be reported including errors, warnings, and imported information.
Batch ID	Select the Batch ID associated with the inquiries stored in the interface table.
Inquiry Details	Select No to exclude inquiry details.
Inquiry Packages	Select No to exclude inquiry package details.
Inquiry Characteristics	Select No to exclude inquiry characteristics.
Inquiry Information	Select No to exclude inquiry information types.
Inquiry Academic Interest	Select No to exclude inquiry academic interests.

Admissions

Using the Admissions subsystem, educational institutions can manage complex admissions processes and materials.

This chapter details the following topics:

- [What's New In This Release](#)
- [Overview of the Admissions Process](#)
- [Entering Applications](#)
- [Maintaining Transcripts and Qualifications](#)
- [Maintaining Admission Test Details](#)
- [Importing Admission Information](#)
- [Processing Applications](#)
- [Making Admission Decisions](#)
- [Closing Admissions](#)
- [Granting Advanced Standing](#)
- [Maintaining Fee Details](#)
- [Generating non-US Admission Statistics](#)

3.1 What's New In This Release

In this release, Oracle Student System has the following new and modified features:

- [Academic History and Transcripts](#)
- [Admission Correspondence](#)

- [Workflow Notifications](#)
- [Dynamic Person ID Groups](#)

3.1.1 Academic History and Transcripts

3.1.1.1 Entering, Importing, and Viewing Multiple Transcripts

You can now maintain and view information about multiple transcripts, for example, transcript details for an applicant who holds a Bachelor's and a Master's degree from the same educational institution. For more information, refer to [Entering Transcript Details](#).

The Admission Import Process concurrent process will now import a partial and a final transcript or an official transcript with identical data for the same program and educational institution. It will also import different transcripts for different programs. For more information, refer to [Importing Test Scores, Transcripts and Applications](#).

The Transcript Summary window enables you to see all the transcripts entered for a single applicant and educational institution. For more information, refer to [Viewing Transcript Information](#).

3.1.1.2 Tracking Unofficial Transcripts

The applicant can now submit a partial or final unofficial transcript to be used in lieu of a final official transcript for application processing. The Admission Tracking Item Completion concurrent process will check for such unofficial transcripts entered in the Academic History Details window and update tracking steps for them. For more information, refer to [Completing APC Tracking Items](#).

3.1.2 Admission Correspondence

3.1.2.1 Informing Applicants of Interview

The Admissions: Interview Details Letters concurrent process will inform applicants whose applications have cleared screening, of the place, date and time of their interview. For more information, refer to [Sending Applicants Interview Letters](#).

3.1.2.2 Reminding Applicants to Confirm Enrollment

Run the Admissions: Admit No Response Letter concurrent process to remind applicants who have been offered admission to respond. You can run this after the offer response deadline has passed and if applicants have failed to respond. For more information, refer to [Reminding Applicants to Respond to Offers](#).

3.1.3 Workflow Notifications

For more information on business events and workflow, see *Oracle Student System Implementation and Administration Guide*. For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

3.1.3.1 Entering Transcripts

Oracle Student System has a new business event, which is raised every time a transcript record is created. You can, if required, create a workflow to subscribe to the business event. For more information, refer to [Entering Transcript Details](#).

3.1.3.2 Entering or Updating Application Outcomes

The Admission Outcome Status Update business event now has parameters which are passed to the Admission Application Instance Outcome Status Update workflow. The workflow is responsible for the notifications sent to administrators alerting them of the change in the application outcome status. This happens each time a decision on the outcome of an application is made, changed or overridden. For more information, refer to [Entering an Application Outcome](#).

In the same way, the Admission Application Instance Outcome Status Update workflow sends a notification when decisions or application outcomes are imported. To facilitate this, parameters have been added to the Admission Application Import Outcome Decision business event which are passed to the new workflow. For more information, refer to [Posting Admission Decisions](#).

3.1.3.3 Entering or Updating Academic Indices

With this release, each time an applicant's academic index is recorded or updated, a new business event is raised. This in turn triggers the Academic Index workflow and sends a notification to the decision maker about the change in the academic index. The decision maker can then use this information when reviewing admission applications. For more information, refer to [Calculating Academic Indices](#).

3.1.3.4 Updating Offer Responses

When the applicant response to an offer is recorded, the Application Offer Response Status Change business event is raised.

If the applicant accepts the offer and a single offer response is applicable to the Admission Process Category (APC), then the Admission Enforce Single Response Notification workflow is triggered. This notifies the administrator that no further response to possible offers for other programs in the same term is required.

If a single offer response is not applicable to the APC or if the applicant declines the offer, the business event triggers the Admission Offer Response Status Change workflow which notifies the administrator.

The new business event and notifications have been introduced to enable the Financial Aid office to start their processing as soon as an applicant accepts the offer. For more information, refer to [Entering an Applicant's Offer Response](#) and [Importing Applicants' Responses to Offers](#).

3.1.4 Dynamic Person ID Groups

You can now use person ID groups that you have created through SQL queries as parameters for the following concurrent processes:

- Admission Tracking Item Completion
- Admission Application Completion
- Admissions Cancel Reconsideration Request

For more information, refer to [Tracking Requirements, Confirming Enrollment and Pre-enrolling Students](#) and [Cancelling Requests for Reconsideration](#).

3.2 Overview of the Admissions Process

Accepting Applications

Applications received during the admission period are entered in Oracle Student System's Admissions subsystem. Applications can be entered in self-service, by an administrator in back office forms or imported from external sources using the interface tables.

An applicant can submit multiple applications for different programs. For example, a student can apply for BSc. Chemistry and for BSc. Physics.

If required by the educational institution, applicants pay the application fee for each application. On accepting an offer, the applicant may also pay an enrollment deposit to confirm enrollment, if required.

Importing Data

During the admissions process, data may need to be brought into Oracle Student System and from third-party data sources. Oracle Student System interface tables facilitate this exchange and the Admission Import Process concurrent process imports data from the interface tables into the Oracle Student System database.

Accepting Supporting Documentation

Applicants are often required to submit specific documents as part of the application process. These documents can include responses to essay questions, letters of recommendation, transcripts, and results of tests, such as Scholastic Assessment Test (SAT) or Test of English as a Foreign Language (TOEFL).

Responses to essay questions on the application are recorded as Personal Statements in Oracle Student System. Transcript information is stored in Academic History, and test results are stored as admission tests in Oracle Student System. The remaining documents, such as letters of recommendation, can be defined and stored as Credentials.

Setting-up the Application Processing Mechanism

Similar applications are grouped into Admission Process Categories (APC). An APC determines the requirements for processing the applications. For example, institutions may have a different set of processing requirements for international applicants than for domestic applicants thus separate APCs would be set up for processing the two application categories.

The application type further refines application processing within an APC. For example, the application type is used to differentiate between an applicant for an undergraduate program and an applicant for a graduate program. The application type determines the fees, deposits, and admission tests and the appropriate personal statements.

Before entering an application, the administrator selects an APC and an application type from those available for the APC. On entry, each application receives a unique, system-generated ID. You can view and track the application requirements to completion.

For more information on APCs and application types, see *Oracle Student System Implementation and Administration Guide*.

Assessing Applications

After applicants submit the necessary documents to complete their applications, applications are evaluated. Assigning evaluators to applications is a three-step process:

1. First, create application review profiles and review groups for each profile. Profiles and groups are used to sort applications and route them to appropriate evaluators for rating.
2. Assign evaluators to review groups.
3. Finally, assign review groups to applications. You can also assign individual evaluators to applications.

Similarly, you can assign screening and interview panels for evaluating applicants. Each panel contains staff or faculty members who screen applications and interview applicants.

Making an Offer

After evaluation, an offer is made. A conditional offer can be made where the applicant must fulfill specific conditions within a given time period. A future-term offer can also be made when the institution is interested in the applicant and all seats in the current term are taken.

When the offer is made, an administrator can decide on the final unit set and units to be offered, taking into consideration an applicant's preferences if desired. Units offered can also depend on recommendations based on test scores.

The administrator sets a deadline by which the applicant must respond. The applicant can defer acceptance to a later term, accept, decline, or withdraw. If the applicant does not respond within the given deadline, the offer is lapsed.

3.3 Entering Applications

An application received at the Admissions office is recorded in the Direct Admission window. Applications received from external sources must first be entered into interface tables and then imported into Oracle Student System using the Admission Import Process concurrent process. For more information on importing applications, refer to [Importing Admission Information](#).

Before an application can be entered, a person record must be created with the details of the applicant. This becomes an applicant record when an application is entered.

Entering applications consists of the following tasks:

- [Creating an Applicant Record](#)
- [Creating an Application](#)
- [Creating a Research Application](#)

An applicant record contains basic information, as well as demographic, family, ethnic, special needs, credentials and other details.

If the applicant was previously contacted, applicant details can include institution preferences, placement test exemptions, and probability values. For more information, see [Managing Inquiries](#) in Inquiry.

An applicant can submit multiple applications each for a different term and APC. A term is a teaching period in an academic and admission calendar. The term and APC together make up a session. For each submitted application, the system generates and displays a unique application ID. Administrators may query an application by this application ID.

An applicant can also apply for different programs in the same term and session if the APC allows. Or the applicant can apply for the same program at a different location as a full- or part-time student. Each program preference for a term and APC is considered an application instance. Application instances share the application ID.

An application can only be closed if all of its instances are closed. A complete application instance must have an outcome status of **Rejected**, **Cancelled**, **Withdrawn**, or **Voided**, or have a **Confirmed Deferment**, or **Accepted Offer**, or **Rejected Offer Response**.

Information unrelated to the program, such as application fees and personal statements, is entered at the application level. Information that is relevant to the program, such as unit set and unit preferences, is entered at the instance level.

The APC assigned to an application determines the method of processing. You can define the following for APC processing step groups:

- Information that must be gathered to create and save an application. This is determined by the APC steps you include for the Program Data - Button, Mandatory Application Details and Mandatory Person Details step groups.
- Requirements that you include as APC steps for the Tracking step group which applicants must complete to enable application evaluation.

- Person, application, program and unit validations that occur when making an offer of admission. These validation levels are APC step groups for which you can include the appropriate APC steps.

To assign additional application requirements, you can specify rules for a particular admission process category.

An application is associated with the application type defined as the default for the APC. If required, you can select, a different application type associated with the APC.

3.3.1 Creating an Applicant Record

Initially, you will record the applicant's individual details. When you create an application, Oracle Student System assigns the person type of **Applicant** to the individual's record.

An applicant can be a returning student, alumni, staff, inquirer, or an individual who uses self-service to apply.

Creating an applicant record includes the following tasks:

- [Entering Basic Applicant Details](#)
- [Entering Additional Applicant Details](#)
- [Querying an Applicant to Edit Applicant Details](#)
- [Entering Applicant Relationships](#)
- [Recording Applicant Activities](#)
- [Entering Academic History](#)
- [Entering Recruiting Information](#)
- [Accepting Credentials](#)
- [Recording Receipt of Academic Honors](#)
- [Entering Admission Test Results](#)
- [Entering Entry Qualifications](#)

3.3.1.1 Entering Basic Applicant Details

Basic applicant details includes name, gender and date of birth.

Prerequisites

A person type is defined and mapped to the system-defined type of Applicant.
Alternate ID types are defined.

Navigation

Admission > Direct Admission

Additional Notes

- Person information that is validated when making an offer is defined in the Admission Process Category Detail window.
- If Oracle Student System detects duplicate person records when entering applicant information, the Duplicate Person Details window opens. Determine if any of the person records retrieved is a match and if the details that you are entering should be saved as a new record, or cleared.
- When you save the record, Oracle Student System generates and displays the unique person number and assigns the person type of **Other**.

3.3.1.2 Entering Additional Applicant Details

Basic applicant details include the following information:

- Ethnicity
- Contact details
- Relationships
- Work experience
- Academics
- Credentials
- Activities

Prerequisites

Self-service responsibility and special needs are defined and mapped to government-defined special need types.

Data groups are defined and associated with privacy levels.

Person ID groups are defined. For each group, members of the group and the person responsible for the group is defined.

User and user-extensible codes are defined for person lookup types.

Navigation

Admission > Direct Admission > Person Detail

Additional Notes

- Query the applicant in the Person Details window and enter information using the tabs and buttons available. Buttons and tab access and privileges for the Person Details window must be defined in the Configuration Form window.
- Buttons available from the Direct Admission window must be defined as steps for the Person Data step group for the APC in the Admission Process Category Detail window.
- For information on entering additional applicant information, see [Creating Person Details](#) in Person.

3.3.1.3 Querying an Applicant to Edit Applicant Details

An applicant who is a returning student, alumni, staff, or inquirer will have a person record in Oracle Student System. Administrators can query the person and edit or update the details.

For information on person details, refer to [Entering Additional Applicant Details](#).

You can query an applicant as follows:

- By name, person number, or alternate person ID from the Direct Admission window using the Find icon from the toolbar.
- By the date of birth or the application ID in the Direct Admission window using the F11 key.
- By the person ID type or enrollment session from the Direct Admission window using the Find Person icon next to the Person field.

The query methods are listed in order of increasing query criteria.

Navigation

Admission > Direct Admission > Find Person

3.3.1.4 Entering Applicant Relationships

You can record applicant relationships which include family, friends, acquaintances, and organizations. For example, you can capture the relationship

between a staff member and an applicant where the staff member is the parent of the applicant.

Prerequisites

Relation types are defined.

Related person or organization exists.

Navigation

Admission > Direct Admission > Relationships

Additional Notes

For information on entering additional applicant relationships, see [Creating Person Relationships](#) in Person.

3.3.1.5 Recording Applicant Activities

You can record details of applicant extra-curricular activities. These can be academic or sporting activities that are related to the applicant's line of study.

Navigation

Admission > Direct Admission > Activities

Additional Notes

For information on recording applicant activities, see [Entering Person Activities](#) in Person.

3.3.1.6 Entering Academic History

You can record transcript information, GPA and grades for degrees that the applicant has previously attempted or earned. For more information, refer to [Maintaining Transcripts and Qualifications](#).

3.3.1.7 Entering Recruiting Information

Applicant information can also be provided by a prospective student. For more information, see [Managing Inquiries](#) in Inquiry.

3.3.1.8 Accepting Credentials

Many educational institutions require applicants to submit their credentials, including portfolios and letters of recommendation.

Applicants must submit credentials for admission if credentials have been checked as mandatory in the Admission Process Category Detail window. Credentials apply for all the applicant's application instances. For more information on setting up admission process category details, see *Oracle Student System Implementation and Administration Guide*.

Evaluators can review credentials and enter their comments. For more information, refer to [Reviewing and Rating Credentials](#).

Prerequisites

Credentials types are defined.

Credentials types are mapped to system-defined credential types and tracking steps.

Reviewer is a faculty member, staff member, or an evaluator.

Navigation

Admission > Direct Admission > More > Credentials

Note: If credentials are received at the time of inquiry, navigate to the Credentials window by clicking the Credentials button in the Record Admission Inquiries window.

Steps

1. Click the Credentials tab and choose a credential type.
2. Enter a description for the credential.
3. Enter the date of receipt. The default is the current system date.
4. Click the Review Details tab.
5. Enter the person number of the reviewer.
6. Click the Recommendation Details tab.
7. If the student has submitted a recommendation letter, enter the name and title of the person recommending the applicant. If the recommendation comes from an organization and not an individual enter the name of the organization.

8. Click **Update Tracking** to request that the credential tracking step status in the Tracking subsystem be updated to **Complete**.
9. Save your work.

3.3.1.9 Recording Receipt of Academic Honors

You can enter any special certificates or academic recognition that the applicant has received. For example, an applicant may have been on the Honors list, given a valedictory address or been recognized for outstanding academic achievement at their previous institution.

Prerequisites

Academic honors are defined for the PE_ACAD_HONORS lookup type.

Navigation

Admission > Direct Admission > More > More > Academic Honors

Additional Notes

For information on recording receipt of academic honors, see [Adding Academic Honor Details](#) in Person.

3.3.1.10 Entering Admission Test Results

If the applicant has taken placement tests such as SAT or ACT, you can either enter test scores or import these through interface tables. For more information on entering test results, refer to [Maintaining Admission Test Details](#).

3.3.1.11 Entering Entry Qualifications

Information on previous degrees or qualifications, subjects and results can be recorded. Administrators can calculate the UCAS tariff for the qualifications of United Kingdom applicants. For more information on qualifications, refer to [Maintaining Transcripts and Qualifications](#). For more information on tariff calculations, see the HESA chapter of *Oracle Student System User Guide for the United Kingdom*.

3.3.2 Creating an Application

Multiple application instances for an applicant can be created, viewed, and tracked. You can enter information at both the application and application instance levels. Information on application fees, applicant interests and intent, and personal

statements are entered at the application level. Application instance details deal with program, attendance, units and unit sets, ratings, outcomes, offer response, and post-enrollment educational goals.

For information on setting up APC steps, see *Oracle Student System Implementation and Administration Guide*.

Creating an application consists of the following tasks:

- [Selecting the Term and Processing Method](#)
- [Initiating an Application](#)
- [Creating an Application Instance](#)
- [Recording Application Details](#)
- [Recording the Receipt of Personal Statements](#)
- [Recording Receipt of Application Fees](#)
- [Entering Desired Unit Sets](#)
- [Selecting Units and Unit Classes](#)
- [Entering Educational Goals](#)
- [Entering Application Notes](#)
- [Notifying Applicants to Complete Applications](#)
- [Acknowledging the Receipt of Applications](#)
- [Importing Undergraduate Applications for non-US Institutions](#)
- [Importing Graduate Applications for non-US Institutions](#)

3.3.2.1 Selecting the Term and Processing Method

The Applications window opens with the Session Details window displaying current session details as default values. You can retain these or select different academic and admission calendars, and an APC. You can change the session details for a new application before saving the application.

Prerequisites

Calendar types and instances are defined for the Admissions system calendar category.

The relationship between academic and admission calendars is defined and superior and subordinate calendars are attached to the admission calendar instance.

Admission categories are defined and mapped to system process types and steps.

Navigation

Admission > Direct Admission > New Application

Steps

1. The Session Details window opens with the current academic and admission calendar, and the standard APC for a Graduate program.
2. Select required values to change the session.
3. Click **Continue** to close the window and populate the Applications window with the admission session details. These are displayed as dynamic prompts across the top of the Applications window, with the application fee status of **Pending**.

Click **Cancel** to close the Session Details and Applications windows.

4. Click **Session Details** in the Applications window to edit details. Click **Continue** to return to the Applications window with the updated information.
5. If required, select an application type other than the one displayed in the Applications window.
6. Select the program to which the applicant has applied.
7. Optionally click the Program Offering Option icon to select the program offering option for the selected program.
8. Save your work.

This saves the admission session and the incomplete application. For information on creating and completing an application, refer to [Creating an Application Instance](#).

You must enter a program to save the application. Once an application is saved, you cannot change the session. You can change session details before saving the application.

3.3.2.2 Initiating an Application

Use the Applications window to create a new application. Enter the program offering option to which the applicant has applied, the expected time of completion, and categories for fees, enrollment, and funding.

Prerequisites

Application types are defined and mapped to APCs.

Possible sources of an application, application entry levels, entry statuses, special groups 1 and 2 are defined.

Schools are defined for an organizational unit.

Planned programs are defined and appropriately mapped.

Program offering options are mapped to admission categories and to unit sets.

Admission categories are defined and mapped to fee and enrollment categories, and APCs.

Navigation

Admission > Direct Admission

Steps

1. To create a new application, click **New Application** in the Direct Admission window.
2. Enter the academic and admission calendars, and the APC in the Session Details window and click **Continue**. For more information on this window, refer to [Selecting the Term and Processing Method](#).
3. In the Program tab, enter the preference number and the program code.
4. Save your work.
5. To complete an existing application, select the application in the Application Summary tab of the Direct Admission window and click **Open Application**.

The Applications window opens with the session details and the application fee status is displayed as dynamic prompts at the head of the window.

6. In the header region of the Applications window, select the Common Application check box if the applicant submits a general application form in addition to the institution's own application form.
7. To sort applications by institution-defined groups, select the desired group from the list of values displayed for Special Group 1 and Special Group 2.
8. In the Program tab, select the Program Offering Option icon and choose from the available combinations of location, and attendance mode and type.

Select the level of entry and the applicant status at the time of entry. If applying to a particular school of the university, select the school. Select the source of the application from the list of values.

9. In the Completion Details tab, enter the expected year of completion or projected completion year. Select the projected completion period.

Select the Display Derived Completion Date check box to display the expected completion date of the program if admission is offered. For the date calculation, Oracle Student System considers the given projected completion period, the program length attached to a program offering, and date aliases defined for the terms. To enable calculation of completion date, include the APC step of **Projected Completion Period** for the **Mandatory Application Details** step group.

10. If the applicant has applied for financial aid, in the Financial Aid tab select the Apply for Financial Aid check box and enter the date on which the application was made. The check box is enabled only if the program applied for is eligible for financial aid.
11. In the Categories tab, change, if required, the default fee and enrollment categories, and the fee assessment defined for the admission category.
12. In the Miscellaneous tab, enter the location of a hard copy of the application. Select the required pre-enrollment educational goal of the applicant. For more information, refer to [Entering Educational Goals](#).
13. Save your work.

On saving, Oracle Student System assigns the person a person type of **Applicant**. In the Person Data Setup window, if you have set additional fields as mandatory in the Mandatory Data tab for the person type of **Applicant**, you must enter the particular information to save the application.

3.3.2.3 Creating an Application Instance

Once an application is created for an admission session, applicants can apply for other programs and program offering options in the same session. These other program applications or application instances share the same application ID, academic and admission calendars, and APC. For information on creating an application, refer to [Initiating an Application](#).

For each application instance level, you can enter interests, honors, credentials, intent, and personal statements separately. For the application instance, enter

program details, offering option, unit sets and units, fee and enrollment categories and pre-enrollment and post-enrollment educational goals.

Prerequisites

An application exists.

Specifying program preferences is allowed.

Navigation

Admission > Direct Admission > Open Application > File > New

Additional Notes

The instance and the application share the same application ID, application level information and session details.

3.3.2.4 Recording Application Details

Use the Application Details window to enter applicant academic and special interests, talents, intents, and the other educational institutions to which the applicant has applied.

Prerequisites

Application details, such as institutions and applicant intent, are defined.

Specifying application details is included in the application processing steps.

Navigation

Admission > Direct Admission > Open Application > Application Details

3.3.2.5 Recording the Receipt of Personal Statements

Personal statements submitted for each application can be maintained irrespective of the application instances. Additionally, if personal statements are to be tracked for the admissions process, you can record their receipt.

Prerequisites

Tracking steps are defined and appropriately mapped.

Personal statement types are defined and mapped to tracking steps that are attached to an APC and then assigned as application requirements.

Navigation

Admission > Direct Admission > Open Application > Personal Statements

Additional Notes

- Enter the type of personal statement provided by the applicant and the date it was received.
- Once all personal statements are entered, click **Update Tracking** to complete the tracking of one pre-admission requirement.

3.3.2.6 Recording Receipt of Application Fees

Use the Application Fees window to enter the amount received towards fees for an application. For more information, refer to [Maintaining Fee Details](#).

3.3.2.7 Entering Desired Unit Sets

Unit sets are groups of units that are normally associated with a program. You can maintain the applicant's preference of unit sets for each application instance. These are considered if the applicant is offered admission and a final unit set must be included.

Prerequisites

Unit sets are defined and attached to a program type.

Unit sets are mapped to a program offering and to a program offering option.

Specifying the desired unit sets is included as a step for application processing.

Navigation

Admission > Direct Admission > Open Application > Desired Unit Sets

Additional Notes

The applicant can select multiple unit sets and rank these in order of preference.

3.3.2.8 Selecting Units and Unit Classes

Applicant's unit preferences can be recorded for each application instance. If the applicant is offered admission, the administrator can consider these preferences along with any unit placement recommendations that the educational institution may offer based on scores of placement tests.

Unit availability for an application instance depends on units attached to a program type, calendar, and pattern of study as well as unit sets attached to and restricted for a program and calendar.

Offered units can be automatically pre-enrolled in the Enrollments subsystem when an admission offer is made, if the Pre-enroll on Offer APC step is included in the Admission Process Category Detail window. If this APC step is not included, the offered units are pre-enrolled by the Batch Pre-enrollment concurrent process.

Prerequisites

Unit statuses, modes, and classes are defined and mapped to system-defined unit statuses, modes, and classes.

Units are defined and mapped to unit statuses, program types, and teaching periods.

For a unit, locations are defined.

Navigation

Admission > Direct Admission > Open Application > More > Unit

Additional Notes

- Enter the desired unit code, the teaching period or term, the location and the class.
- The unit outcome status defaults to **Pending**.
- The unit status, attendance mode, and name of the unit are displayed in the Direct Admission Unit window.

3.3.2.9 Entering Educational Goals

Enter an applicant's pre-enrollment educational goal when creating an application. For more information, refer to [Initiating an Application](#).

Post-enrollment educational goals can be entered:

- At the time of application
- After an offer is made
- After the applicant accepts the offer

Prerequisites

Educational goals are defined.

Specifying the educational goals is included as an application processing step.

Navigation

Admission > Direct Admission > Open Application > More > Educational Goals

3.3.2.10 Entering Application Notes

You can enter and edit important additional application details. Notes include information on an applicant and application that cannot be entered in any other application processing window, and can include information from informal applicant interaction.

Prerequisites

An application is entered and saved.

Application note types are defined for the application note category.

Application notes are included as a step for application processing.

Navigation

Admission > Direct Admission > Open Application > Notes

Additional Notes

Select the appropriate note type and click **Edit Notes** to enter the notes in the Text Notes window.

3.3.2.11 Notifying Applicants to Complete Applications

The Incomplete Applications Notification concurrent process serves to remind applicants who enter applications in self-service to complete and submit applications they have started. It is more likely that institutions will run this concurrent process at the close of the application due date.

You can run the concurrent process for:

- Single applicant
- Group of applicants
- Applications for a program

- Applications for a program offering option
- Applications belonging to an admission process category
- Applications belonging to an application type of an admission process category
- Applications that have as yet no calendar information

Prerequisites

Applications in self-service that are not completed and submitted by the applicants.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Incomplete Applications Notification concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Incomplete Applications Notification concurrent process parameters.

Table 3–1 Incomplete Applications Notification Parameters

Parameter	Description
Person Number	Restricts the notification for incomplete applications to a single applicant.
Person ID Group	Restricts the notification for incomplete applications to applicants in a particular person group.
Calendar Details	Select the admission calendar for which the process will consider incomplete applications.
Admission Process Category	Restricts the notification for incomplete applications with a common APC.
Application Type	Restricts notification to incomplete applications with a application type for the selected APC.
Program Code	Restricts notifications for incomplete applications by program.

Table 3–1 (Cont.) Incomplete Applications Notification Parameters

Parameter	Description
Location	Restricts notifications for incomplete applications by the program teaching location. If you select a location and an attendance type and mode, you can restrict notifications by a program offering option.
Attendance Type	Restricts notifications for incomplete applications by attendance type. If you select an attendance type and an attendance mode and location, you can restrict notifications by a program offering option.
Attendance Mode	Restricts notifications for incomplete applications by attendance mode. If you select an attendance mode and an attendance type and location, you can restrict notifications by a program offering option.
Include Application without Calendar Information	Select Yes to include incomplete applications in self-service that have no calendar information. Select No to exclude applications that have no calendar information.
Application Range	Select Current to include applications for the current admission calendar. Select Current and Future to include applications for the current and future admission calendars.

3.3.2.12 Acknowledging the Receipt of Applications

Run the Admissions:Acknowledgement Letter concurrent process to send an acknowledgement letter to the applicant after an application is received.

You can send acknowledgement letters to:

- Single applicant
- List of applicants
- Applicants of a person ID group
- Applicants who applied in a given period
- Applicants with applications in a session

A letter can be resent to an applicant or student only after a certain interval has lapsed. If an applicant, for instance, has not received the acknowledgement letter, set the Override Flag parameter to **Yes** to override the number of elapsed days set in the Mapping and Attributes window in Correspondence.

You can acknowledge application receipt by e-mail, fax or by posting a printed copy of the letter. If you choose to fax or print the letter, you must enter details of the fax machine or the printer in the Destination parameter.

For more information, see [Admissions - Acknowledgement Letter Concurrent Process](#) in Correspondence.

3.3.2.13 Importing Undergraduate Applications for non-US Institutions

The Admissions Government Offer File Load concurrent process loads admission applications for non-US institutions. The applications are received from the government as flat files.

Depending on the data, this concurrent process performs the following tasks:

- Checks for matching person records
- Creates a person ID or uses an existing one and attempts to insert a new alternate person ID record using the government ID
- Inserts person address details according to the address type parameters
- Retrieves the admission code and basis for admission type for a government admission code
- Validates and inserts admission application, program application, and application instance details; creates admission program application instance with an outcome status of **Offer**
- Inserts a secondary education, secondary education subject, and tertiary education record for an application

For information on the Tertiary Admission Center Admission process, see Secondary and Tertiary Education Details in the Admissions chapter of *Oracle Student System Implementation and Administration Guide*.

This concurrent process has no parameters.

Prerequisites

Non-US governments have sent a file of undergraduate admission applications to the educational institution.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

3.3.2.14 Importing Graduate Applications for non-US Institutions

The Admissions Postgraduate Government Offer File Load concurrent process loads graduate admission applications for non-US institutions that are received from the government as flat files.

Depending on the data, this concurrent process performs the following tasks:

- Checks for matching person records
- Creates a person ID or uses an existing one and attempts to insert a new alternate person ID record using the government ID
- Inserts person address details according to the address type parameters
- Retrieves the admission code and basis for admission type for a government admission code
- Validates and inserts admission application, program application, and application instance details; creates admission program application instance with an outcome status of **Offer**
- Inserts a secondary education, secondary education subject, and tertiary education record for an application

This concurrent process is run as required when the government offer round file is provided, and produces a log file of the action performed for each record.

Prerequisites

Non-US governments have sent a file of graduate admission applications to the educational institution.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admissions Postgraduate Government Offer File Load concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Admissions Postgraduate Government Offer File Load concurrent process parameters.

Table 3–2 Admissions Postgraduate Government Offer File Load Parameters

Parameter	Description
Offer File Name	Enter the directory and full path to the offer file.
Offer Round	Enter the round number as given in the offer round file.
Academic Calendar	Select the academic period to which the process must load the applications. If you do not enter a value, the process takes the current academic calendar.
Admission Calendar	Select the admission period to which the process must load the applications. If you do not enter a value, the process takes the current admission calendar.
Address Type	Select the domestic address type supplied by the government. This can be for correspondence, billing, or delivery. An address type is entered for both domestic and overseas addresses. Domestic applicants can provide an overseas address.
Overseas Address Type	Select the overseas address type as supplied by the government. This could be the headquarters, the claims office, or the legal office. Domestic applicants can provide an overseas address.
Alternate Person ID Type	Select the identification number given by the government.
Override Admission Category	Select the admission category created for government admissions. This will override the default admission category for the program offering option.
Pre-enroll Indicator	Select Yes to ensure that the application is pre-enrolled when uploaded or No to pre-enroll later. Applications not pre-enrolled by this concurrent process are pre-enrolled by the Batch Pre-Enrollment Process concurrent process, if allowed by the admission process category steps.
Offer Letter Required	Select Yes to generate a letter of offer as soon as the application is uploaded. Select No if an offer letter need not be generated by the educational institution. Offer letters can be produced by government.

3.3.3 Creating a Research Application

When entering an application for a research program, administrators enter details specific to the nature of the program in addition to the usual application details.

An applicant for a research program may not receive an offer or conditional offer unless certain details of the candidacy record are entered such as submission dates, research topic, and principal supervisor.

Creating a research application involves:

- [Entering Research Candidacy Details](#)
- [Identifying Research Supervisors](#)

3.3.3.1 Entering Research Candidacy Details

The Research Candidacy Details window maintains all data related to a research candidate. This window provides a central point of access to other windows in the Research subsystem. For more information on this, see [Adding and Maintaining Research Details](#) in Research.

For administrators to process a research application, the submission dates and research topics must be entered.

Prerequisites

Specifying the research candidacy details is included as a step for application processing.

Research program types are defined and attached to active programs.

For the program type to enable the creation of a candidacy record, the Research Type indicator is selected.

Navigation

Admission > Direct Admission

Steps

1. Query an applicant or enter a new applicant in the Direct Admissions window. Click **New Application**.
2. Select session details, click **Continue**.
3. Select a research program and enter this in the Applications window.
4. Save your work.

On saving, the start date for the research program is computed and displayed in the Research Candidacy Details window.

5. Click **More** to display the next set of buttons. Click **Candidacy** to open the Research Candidacy Details window.
6. Enter the topic or topics that the applicant has chosen for the research.
7. Save your work.
8. In the Research Candidacy region, enter the submission dates. The attendance percentage is that set for research at the program level for the candidate's attendance type.

You can edit the attendance percentage. The system then computes the new value for the Effective Full Time Student Units (EFTSU) for the applicant and if this falls below the load range defined for the attendance type at program level, it displays a warning.

The minimum submission date must be greater than or equal to the program start date displayed. This program start date is not the same start date entered for the program.

Also, the maximum submission date must be greater than the minimum submission date.

9. Save your work.

3.3.3.2 Identifying Research Supervisors

Use the Research Supervisors window to enter information about research supervisors. A research candidate can have one or more supervisors over a candidacy period with one principal supervisor defined. For administrators to offer a research candidate admission, the principal supervisor must be identified.

For other details such as substitute supervisors, and funding and supervision percentages in this window, see [Adding Supervision Details](#) in Research.

Prerequisites

Supervisor types are defined.

Navigation

Admission > Direct Admission > Open Application > More > Candidacy > Supervision

Additional Notes

In the Research Supervisor region, select a principal supervisor type and enter the person number of the principal supervisor and the start date of supervision.

3.4 Maintaining Transcripts and Qualifications

Applicants must submit transcripts for courses they have completed and for which they have received degrees or awards. If the applicant is from the United Kingdom or from a commonwealth country, the educational institution in United States can capture past academic achievements as qualifications received from the awarding body for examinations taken and passed.

Information on the degrees and qualifications of a prospective student can be entered while creating an inquiry or an application. The applicant can also enter these in self-service. Program eligibility, advanced standing, the calculation of an applicant's academic index and predicted GPA, and the admission decision process may all consider and use these details. For more information, refer to [Granting Advanced Standing](#).

Maintaining past academic details includes:

- [Entering Qualification Details](#)
- [Entering Transcripts](#)

Transcripts display the units studied in a program, the credit points awarded by the institution, and the grades achieved. Units are associated with credit points, and assessment items, on which the student is graded. Grades are mapped to a grading scale that is set up in the Admissions subsystem. GPA is calculated from these grades.

Qualifications are used instead of credit points and GPA in the UK and other commonwealth countries. Qualifications are for a subject and a specified level. The student takes a qualifying examination in a subject and is graded not by the institution where the student studied, but by the examination board or awarding body. United Kingdom and commonwealth grades or results are mapped to grading schemas that are defined in the Records subsystem. Individual subject grades of a student are used to derive a total single score or UCAS tariff for all the qualifications attained.

3.4.1 Entering Qualification Details

Applicants who studied in the United Kingdom or other commonwealth countries may have taken examinations conducted by independent examining and awarding bodies.

Qualifications can be awarded at various levels, such as Ordinary (O-Levels), Advanced (A-Levels), Bachelors (undergraduate), Masters (postgraduate) and Doctorate (research) and can include vocational and academic qualifications.

Administrators capture the subject and results for each of the qualifications that the applicant has passed.

Results captured can be of three types:

- Predicted, which can be used when the applicant is studying for a qualification but has not sat for the examination.
- Claimed as reported by the applicant, which can be used when the applicant has provided the results but the results have not been ratified by the awarding body.
- Approved or final as displayed in the qualification certificate from the awarding body or provided using an electronic transfer directly from the awarding body.

Administrators also enter qualification-related details such as the year and sitting of the examination, and the name of the examining body that awards the qualification.

The UCAS Tariff tab is disabled if the country profile is not **UK**.

Qualification details can be imported from UCAS, imported from a legacy system, or entered manually. For information on importing qualification details from UCAS and calculating UCAS tariff for an applicant applying to an educational institution in the United Kingdom, see *Oracle Student System for the United Kingdom User Guide*.

Prerequisites

Qualifications are defined as Oracle Student System awards.

Grading schemas and grades are defined and associated with the awards.

Awarding bodies are defined as Oracle Student System institutions.

Qualification subjects are defined as Oracle Student System fields of study.

Navigation

Admission > Direct Admission > More > More > More > Qualification Details

Additional Notes

- On saving the approved results, the score is automatically populated with the grading schema grade rank. For information on tariff scores and the disabled UCAS Tariff tab, see *Oracle Student System for the United Kingdom User Guide*.
- In the Qualification Details tab, select the qualification of the applicant. Enter the subject of the qualification and the year in which it was obtained. Select the awarding body, the time or sitting of the qualifying examination. Select also the predicted, claimed, and final or approved grades for the qualification subject.
- On saving the approved results, the score is automatically populated, but is displayed only if the country profile option is set to UK. For information on tariff scores and the disabled UCAS Tariff tab, see *Oracle Student System for the United Kingdom User Guide*.
- Attendance history for previous education is captured in the Academic History Details window. For more information, refer to [Entering Program Information](#).

3.4.2 Entering Transcripts

The Academic History Details window provides a single point access to windows where administrators can capture all transcript information such as:

- Educational institution who awarded the degree
- Programs for which applicants received awards
- Class rank
- Class size
- Course duration or attendance
- Aggregate credit points and grades
- Grades at the term and unit level

As grading scales differ across educational institutions, administrators can map grading scales and grades, and recalculate and convert previously received grades and GPA to make them more meaningful.

At the time of inquiry or application the transcript status may be **Provisional** or **Unofficial**, and **Incomplete**. Even when a prospective student applies for a program, details such as final GPA on a program just completed may not be available. In such cases, unofficial transcripts are tracked and considered when making an admission decision.

Entering transcripts involves:

- [Entering Program Information](#)
- [Entering Transcript Details](#)
- [Entering Term Grades](#)
- [Entering Unit Grades](#)

3.4.2.1 Entering Program Information

Use the Academic History Details window to enter and add details of applicant degrees and awards. This includes information about the institutions attended, details of programs attempted, grade aggregates and final awards.

You can also deactivate an academic record. When applying for a master's degree in Sociology, an applicant's previous English degree may not be relevant and could be inactive.

Prerequisites

Qualification levels are defined.

Grading scales and default values for the Institution Grading Scale profile option are defined.

Navigation

Admission > Direct Admission > More > Academic History

Steps

1. Select the highest qualification level of the applicant from the list of values.
2. Select the institution. Optionally enter the duration of the course.

Transcript details for the institution can now be received and recorded. A transcript is considered received and the Received check box selected only if the transcript received is of the same type and status as that set up for the **IGS: Admission Transcript Type**, and **IGS: Admission Transcript Status** profile options. For more information on the new profile options of transcript type and status, see *Oracle Student System Implementation and Administration Guide*.

3. In the History Details tab, enter program and degree details. Select Current Institution check box if the applicant is taking the course at the same institution to which an admission application for a new course is being submitted.

4. In the Self Reported Details tab, enter grade-related details for the program attempted as reported by the applicant or inquirer. This includes the grading scale of the previous institution, GPA units attempted and GPA achieved, unit credit points attempted and earned, and unit grade points.
5. In the Recalculated Details tab, you can manually recalculate grades and GPA directly, for a program that the applicant has completed. The grading scale is that used by the institution and set as default for the **IGS: Institution Grading Scale** profile option.
6. Save your work including the grade conversion details for the transcript.
7. To create another record for a course that the applicant has completed at the same institution, move to a new row for institution, select the same institution and repeat steps 3 -6.
8. Save your work.

Additional Notes

- If there are academic records imported from third-party systems they will be displayed as read-only records in the Academic History Details window. The Transcript Summary button will be disabled for the imported records. You can activate or inactivate these records.
- Deselect the Active check box to inactivate an academic history record.
- Click the Show Active Records radio button to display only active records in the Academic History Details window. Click the Show All Records radio button to display all records including inactive records.
- You cannot inactivate an academic history record for which advanced standing details have been recorded.

3.4.2.2 Entering Transcript Details

Use the Transcript Summary window to navigate to the Transcript Details window and enter or edit transcript information. You can enter more than one transcript for different programs or for the same program. Transcript details include the source, status and type of transcript, rank in class, and GPA.

You can both enter and track partial and final unofficial transcripts. For information on values for *Transcript Type* and *Status*, see Oracle Student System Profile Options in *Oracle Student System Implementation and Administration Guide*.

You must enter transcript information if the Required check box against the institution in the Academic History Details window was selected. The Required

check box is also used for tracking application requirements completion. If transcripts are set as a requirement for application completion, then the Admission Tracking Item Completion job uses the Required check box to determine if all the required transcripts have been received for this application or not. For more information on the Admission Tracking Item Completion concurrent process, refer to [Completing APC Tracking Items](#).

Prerequisites

Transcript sources, types and statuses are defined.

Term types are defined.

Grading scales and GPA conversions are defined.

Navigation

Admission > Direct Admission > More > Academic History > Transcript Summary > New or Open

Steps

1. Select transcript status, type, source, and the date of issue.
2. Select the term type, semester or quarter.
3. Enter the grading scale used by the previous institution. Optionally enter the GPA of the applicant in the given grading scale.

On entering this information, Oracle Student System picks up the default grading scale of your institution from the default value set for the **IGS: Institution Grading Scale** profile option. Oracle Student System uses the GPA values mapped between your institution's grading scale and that of the previous institution in the Grade Conversion window and displays the converted GPA.

It is necessary to enter the GPA again in the Transcript Details window, despite having entered the same GPA in the Self Reported Details tab of the Academic History Details window.

4. Optionally, enter date of receipt of transcript, rank in class and class size.
Select the Weighted Rank check box if the rank in class depends on the size of the class. Otherwise, select the Approximate Rank check box.
5. Save your work.

On saving, Oracle Student System uses the class rank and size to calculate and display the decile, quartile and quintile values. If authorized and the Override check box for a transcript is selected, you can override percentile, decile, quartile and quintile values. When you override, your ID and the date of the override are displayed.

6. Click **Update Tracking** to update the Tracking subsystem for the transcript received. You need to do this if the Required check box has not been deselected in the Academic History Details window for the applicant and if tracking items for transcripts have been created in the Requirements window.

This runs the Admission Tracking Item Completion concurrent process to update the transcript tracking step as complete. Alternatively, you can run the concurrent process later to complete transcript tracking across applications.

7. Save your work.

On saving, the converted GPA is displayed and the oracle.apps.igs.ad.appl.mult_trns business event is raised. If required, you can create a workflow to subscribe to this transcript business event.

3.4.2.3 Entering Term Grades

Use the Transcript Summary and Transcript Details windows to navigate to the Term Details window and enter the GPA attempted and achieved for the program by term.

Prerequisites

Units in a program are attempted and completed.

Navigation

Admission > Direct Admission > More > Academic History > Transcript Summary > New / Open > Term Details

Additional Notes

- In the Term Details tab, enter the term and term duration.
- In the Term Summary tab, enter the total GPA units attempted and the GPA achieved.
- In the Unit Details window, if you have entered the credit and grade points attempted and earned for each unit, the totals are displayed here.

- The dates associated with a term can be edited. To edit a term after saving, delete all associated unit records and then delete the term. You can then create a new term record and associated unit records as necessary.

3.4.2.4 Entering Unit Grades

Use the Unit Details window to enter break-up of grades and credit points at the unit level for the completed program.

Prerequisites

A transcript exists which includes term details.

Unit difficulties are defined.

Navigation

Admission > Direct Admission > More > Academic History > Transcript Summary > New / Open > Term Details > Unit Details

Additional Notes

- In the Unit Details tab, enter names and levels or difficulty for all the program units attempted.
- In the Grades tab, enter the grade points, credit points attempted and earned, and the grades achieved for each of the units.
- On saving, the total attempted and earned credit points, and the total unit grade points are displayed.
- To edit a unit name after saving, you need to delete the associated unit record and recreate the unit again.

3.5 Maintaining Admission Test Details

Educational institutions may require admission placement tests. These are usually taken externally. Applicant test scores may then be imported in bulk or entered manually.

You can define a range of test scores and recommend units to offer applicants with relevant scores. Applicant test scores are considered before offering admission, in offering units, and when granting advanced standing.

If test scores are not in the format that the educational institution is familiar with, administrators can run the Convert and Import Test Scores concurrent process to

convert them into usable format. You can set up how scores are to be recorded or imported, including as individual or composite scores, as percentiles, or as rank.

Maintaining admission test details includes:

- [Entering Admission Test Results](#)
- [Importing a Group of Test Scores](#)
- [Converting Test Scores](#)

3.5.1 Entering Admission Test Results

Use the Admission Test Summary window to navigate to the Admission Test Results window and enter the admission test scores of an applicant. You can enter scores and grades for test segments within a test type.

Admission test scores are considered in offering admission and units, and in granting advanced standing. For information on unit placements, refer to [Viewing Recommended Units](#). For information on advanced standing, refer to [Granting Advanced Standing](#).

Prerequisites

Admission test types are defined and mapped to system score types, tracking steps, and admission application types.

Test segments are defined for test types.

Score types and score ranges are defined for test segments.

Navigation

Admission > Direct Admission > More > More > Admission Tests

Steps

1. Click **New** to enter the test results of the applicant in the Admission Test Results window. These include the test type, the grade, date, score source, and education level.

In the Test Segments tab, enter the score and percentile for each segment. In the Other Details tab, enter the rank and lower and upper score limits for the selected test segment. Select the Non Standard Administration check box if the test is not a standard test. Select the Active check box if the test type entered is valid.

Fields in the tabs of the Admission Test Results window are enabled if the relevant check boxes were selected in the Test Segments window.

2. Click **Open** in the Admission Test Summary window to edit test result details.
3. Save your work.
4. Click **Convert Test Scores** to convert the applicant's test scores if required.
For more information, refer to [Converting Test Scores](#).
5. Click **Update Tracking** to complete tracking of admission test scores for the applicant.
6. Save your work.

3.5.2 Importing a Group of Test Scores

Run the Admission Import Process to import test scores. Select the import source type that is mapped to the system source type of test results. For more information, refer to [Importing Test Scores, Transcripts and Applications](#).

3.5.3 Converting Test Scores

Admission test scores may need to be converted or recalculated before administrators can use the information in making decisions. The conversion can be between test types or can reflect recentering or readjustment within the same test type.

Click the Convert Test Scores button in the Admission Test Results window to arrive at combined test scores for a single applicant. To convert test scores for a group of applicants, run the Convert and Import Test Scores concurrent process.

The concurrent process for either a single applicant or a group of applicants in a person ID group, invokes the user hook wrapper procedure. You can define the business logic in the hook for each person in the person ID group. This will be used to populate the interface tables IGS_AD_TSTRST_UH_INT and IGS_AD_TSTDTL_UH_INT with the appropriate details, validate the data and transfer it from interface tables to Oracle Student System tables.

For more information on this process, see the Test Score Conversion and Import Process chapter in *Oracle Student System Open Interfaces User Guide*.

Prerequisites

Test scores exist.

Navigation

To convert single applicant test scores:

Admission > Direct Admission > More > More > Admission Tests > New /Open

To convert multiple applicant test scores:

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Enter test scores in the Admission Test Results window and save your work.
2. Click **Convert Test Scores** to convert single applicant test scores.
3. Close the Admission Test Results window and return to the Admission Test Summary window to view the converted score displayed in the Combined Score field for each test segment.
4. To convert the test scores for a group of applicants using the Convert and Import Test Scores concurrent process, select the person ID group to restrict the applicant test scores that the process must import.
5. Apply the parameters and submit the request.
6. To verify, query an applicant in the person ID group and view converted test scores in the Combined Score field for each test segment in the Admission Test Summary window.

3.6 Importing Admission Information

Admission data from external sources is imported into Oracle Student System. These include electronic test score reports for admission placement tests, transcripts, and applications.

Administrators use the Admission Import Process concurrent process to import applications, transcripts, and the results or test scores of admission placement tests.

This section consists of the following:

- [Importing Test Scores, Transcripts and Applications](#)
- [Using the Admission Import Process](#)
- [Importing Person Details](#)
- [Identifying Application Import Failures](#)
- [Reviewing Errors in Application Import](#)

- [Identifying Transcript Import Failures](#)
- [Reviewing Errors in Transcript Import](#)
- [Identifying Failures in the Import of Test Results](#)
- [Reviewing Errors in the Import of Test Results](#)

The Admission Import process imports:

- Person information
- Recruiting information
- Inquiries
- Applications
- Transcripts
- Test results

Applications, transcripts and test results are system-defined source types for data import. For a source type, you can group records in the interface tables for import. You can also define data subcategories or source categories to include in the import. For example, for an application source type, source categories include credentials, qualifications, activities, personal statements, fees, and employment.

Before importing data, the Admission Import Process matches records in the interface table with those in Oracle Student System. You can define the rules to be followed if discrepancies are found during the matching. For more information on the Admission Import Process concurrent process, refer to [Using the Admission Import Process](#).

3.6.1 Importing Test Scores, Transcripts and Applications

Administrators use the Admission Import Process concurrent process to import admission information into Oracle Student System from interface tables.

The concurrent process imports applications, test results, and transcripts according to the discrepancy rules selected and match set criteria defined by administrators. Person details are also imported. For information on using the Admission Import Process, importing person data and reviewing partial and multiple exact matches found, refer to [Using the Admission Import Process](#) and [Importing Person Details](#).

Importing Applications

Applications received from the government and from external agencies must be imported into Oracle Student System before they can be processed for admission.

Applications that have been processed or are in process in legacy systems must also be migrated to Oracle Student System.

You can use the Admission Import Process to import third-party and legacy applications into Oracle Student System. Application details for import include:

- Qualifications
- Credentials
- Application fees
- Personal statements
- Outcome status history of legacy applications in processing
- Legacy applications that have been completed processing

Importing Transcripts

Transcript information relates to an applicant's past academic performance. Evaluators often use this information in rating an application. Administrators may use it to predict applicant GPA, calculate academic index, or grant advanced standing.

Transcripts are provided by an applicant's previous institution. You load transcripts into interface tables and then use the Admission Import Process concurrent process to import these into Oracle Student System. You can import multiple transcripts for an academic history into the Oracle Student System. Additionally, you can now import multiple transcripts from the same institution for the same applicant.

Importing Test Scores

Most US students take standardized admission placement tests as a part of applying for post-secondary education, for example, the Test of English as a Foreign Language (TOEFL) for international students. These are conducted by agencies rather than educational institutions.

Administrators load test results provided by these agencies into interface tables and use the Admission Import Process concurrent process to import these into the Oracle Student System.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Additional Notes

- For prerequisites, refer to [Entering Applications](#), [Entering Transcripts](#), and [Maintaining Admission Test Details](#).
- Set the source type to Applications, Transcripts, or Test Results, enter the batch ID, and run the Admission Import Process concurrent process to transfer the relevant information from the interface tables to the appropriate Oracle Student System target tables.
- For more information on interface tables, see the Admission Import Process chapter in *Oracle Student System Open Interfaces User Guide*.

3.6.2 Using the Admission Import Process

The Admission Import Process concurrent process can be used to import different types of information, such as test results and transcripts, from interface tables to the Oracle Student System tables.

The Admission Import Process concurrent process also imports person information and person relationships. The type of information to be imported, such as applications, inquiries, or test scores is called a source type. You must define source types that your institution imports and map these to system source types of:

- **Application:** to import applications.
- **Manual:** to manually enter inquiries and applications in the back office windows.
- **Prospect List:** to import person and recruiting information.
- **Prospect Self-Service Web Inquiry:** to import inquiries.
- **Test Results:** to import test scores.
- **Transcripts:** to import grades and GPAs for previous program and unit attempts.

For a source type, administrators define groups of records with a unique description for easy reference. These groups of records are then loaded into interface tables ready for import. The Admission Import Process concurrent process imports data of specific type for the given group.

For each source that you define, you can create match sets. A match set comprises of data elements. For each data element, you can define if the Admission Import Process concurrent process should check for duplication between imported and existing information and the extent of the check. This duplication of information is called a *discrepancy*.

The level of duplication can be *partial* or *exact*. A piece of information that is being imported may exactly match the information in many existing records. The concurrent process is then said to have found multiple exact matches.

Information imported for a source type can be divided into *source categories*. For instance, person details, addresses, employment, and academic history are source categories addressed while importing from a list of prospects. The source type in this case is Prospect List.

Every source type has some mandatory source categories that must be imported. You can include other categories. While importing, if no matches are found, new records are created in Oracle Student System.

For a discrepancy that is found in the import of a source category, you can define the course of action to be followed. *Discrepancy rules* state the following courses of action:

- Keep Existing Values and disregard discrepancies.
- Update Existing Values with Imported Values changing existing Oracle Student System records.
- Review Details of partial, exact and multiple exact matches found between imported and existing Oracle Student System records.

Using the Admission Import Process concurrent process involves:

- [Defining Import Source Types](#)
- [Importing Different Source Type Data](#)

3.6.2.1 Defining Import Source Types

You can define the different information that the educational institution would import and map these to system source types.

Prerequisites

Person types are defined and mapped to the appropriate system user types.

Navigation

Person Reference > Setup > Source Types

Additional Notes

In the Source Types window, define information source types that your institution imports and map each to the appropriate system source type.

3.6.2.2 Importing Different Source Type Data

Once source types are defined and mapped to system source types, select a batch and source type and run the Admission Import Process concurrent process to import the required data from the interface tables. While importing data of a given type, the concurrent process also imports person information and person relationships.

You can also import legacy data by setting the legacy parameter to **Yes**. For example, you can import legacy inquiry data for a given group of records, or legacy transcripts. When importing legacy applications you can include those with ongoing processing and those that have completed processing.

Prerequisites

Source type are defined and mapped to system source types.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admission Import Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Admission Import Process concurrent process parameters.

Table 3–3 Admission Import Process Parameters

Parameter	Description
Batch ID	Select the required interface table batch ID for the process to import values of the particular batch. The batch description is displayed as a dynamic prompt.
Source Type	The source type associated with the batch ID is automatically populated when you click on the list of values.
Match Set	Select a match set for the source type.
Legacy	Select Yes to import legacy applications and No to import test results, transcripts or current applications.
Enable Error Logging	Select No to disable error logging.

3.6.3 Importing Person Details

Administrators import person information into Oracle Student System from interface tables using the Admission Import Process. This includes person and relationship details. This information must first be loaded into interface tables from third-party sources in the same way as inquiries and applications.

You can define matching criteria to be used when importing person attributes. You can choose to import all the attributes that constitute person information and select the course of action to be taken if duplication is found when importing each of the attributes.

For more information on source categories and match criteria sets, see *Oracle Student System Implementation and Administration Guide*.

Importing person information involves:

- [Including Source Categories and Defining Discrepancy Rules](#)
- [Defining Person Attribute Discrepancy Rules](#)
- [Defining Match Sets and Import Criteria](#)
- [Identifying Exact and Partial Matches](#)
- [Reviewing Multiple Exact Matches](#)
- [Reviewing Partial Matches](#)
- [Identifying Failed Person Imports](#)
- [Identifying Errors in Person Import](#)

- [Identifying Matches in Person Relationship Import](#)

3.6.3.1 Including Source Categories and Defining Discrepancy Rules

Use the Source Categories window to define the course of action to be taken if discrepancies are found between imported and existing records. You can also include source categories other than the mandatory ones for a source type and define discrepancy rules for them.

Discrepancy rules state the following courses of action:

- *Keep Existing Values* and disregard discrepancies.
- *Update Existing Values with Imported Values* changing existing Oracle Student System records.
- *Review Details* of partial, exact and multiple exact matches found between imported and existing Oracle Student System records.

You can choose to import all Person Details attributes and set discrepancy rules at the attribute level. For more information, refer to [Defining Person Attribute Discrepancy Rules](#).

Prerequisites

Source types are defined and mapped to system source types.

Navigation

Admission > Admission Setup > Setup Import Processes > Source Categories

Steps

1. Query a source type in the Source Categories window.

The default source categories for the system source type will be displayed. Some of these source categories will be displayed as Mandatory.

You cannot deselect the Mandatory check box if it is selected for a source category.
2. Select the required discrepancy rule for each of the mandatory source categories.
3. Select the Include check box against a source category that the Admission Import Process concurrent process must import.

Select the required discrepancy rule for each source category that you include.

4. For the Person Details source category, select the Detail Level check box if all person attributes are to be imported.
5. Save your work.

3.6.3.2 Defining Person Attribute Discrepancy Rules

Use the Detail Discrepancy Rules window to define rules for the import of each person attribute.

For more information, see *Oracle Student System Implementation and Administration Guide*.

Prerequisites

The Person Details source category is included for the source type and the Detail Level check box is selected.

Navigation

Admission > Admission Setup > Setup Import Processes > Source Categories > Detail Discrepancy Rules

Steps

1. Query a source type in the Source Categories window.
The default source categories for the system source type will be displayed.
2. Select the Include and Details Level check box for the **Person Details** source category and click **Detail Discrepancy Rules**.
3. In the Detail Discrepancy Rules window, select the appropriate discrepancy rule for each of the attributes of the **Person Details** source category.
4. Save your work.

3.6.3.3 Defining Match Sets and Import Criteria

Use the Match Criteria Sets window to create match sets for a source type. A match set contains the person attributes or data elements of the source type. You can define matching criteria both for the set and for individual person attributes.

Criteria for matching person attributes in interface and existing records are **Drop if Null** (do not consider for matching if no value is given), **Exact** (and), and **Partial** (any).

For every match set, interface and existing records are first matched for the first character of the given name and the surname. Only if there is an exact match are other person attributes checked per the criteria you define. All person attributes of interface and existing records are first checked for all the exact matches defined and then for partial matches if defined.

Although both the Exact and Partial check boxes are selected by default for the person attributes of Given Name - First Character and Surname, the partial match here holds no significance.

This is the order in which matching occurs:

- Exact match
- Multiple exact matches
- Partial match
- Skip exact and check for partial matches for null values
- Skip both exact and partial for null values

If exact or partial matches are found, the Admission Import Process concurrent process processes the record according to the discrepancy rule if defined for the person attribute and if not defined, then per the rule defined for the source category.

If the discrepancy rule was set to review, administrators can review multiple exact matches and partial matches in the relevant window before deciding on a final course of action. For more information, refer to [Reviewing Multiple Exact Matches](#) and [Reviewing Partial Matches](#).

Prerequisites

Source types are defined and mapped to system source types.

Source categories are defined for source types.

Discrepancy rules are defined for source categories.

Navigation

Person Reference > Setup > Match Criteria Sets

Steps

1. In the Match Criteria Sets window, query the source type for which you want to create a match set.

The person attributes of the source type are displayed.

2. For each person attribute select the required check box for matching.

You must select the Exact check box to select the Partial or the Drop if Null check boxes. You can select all three check boxes for a person attribute. You can either select the Concatenated Address person attribute or the individual Address Line elements for exact or partial matching.

3. If required, define matching criteria for the set.

Selecting the Partial if Null check box at the set level disables the Drop if Null functionality at the person attribute or data element level. If you select the Primary Address check box, then you cannot set matching criteria for the **Address Type** person attribute.

4. Save your work.

5. Run the Admission Import Process concurrent process.

If a person attribute has a null value, and the Drop if Null check box was selected, the attribute is not considered in matching. If however, the person attribute has a value, then the attribute is considered first for exact matching. If no exact match is found and partial matching is included, then the person attribute is checked next for partial matches.

If a person attribute was selected for both exact and partial matching, first exact matching is done and if no exact matches are found, the records are then checked for partial matches.

If the Partial if Null check box was selected for the set and any of the person attributes have a null value, then all person attributes are considered only for partial matching where defined. If none of the attributes have a null value, then matching follows the usual order of exact followed by partial.

3.6.3.4 Identifying Exact and Partial Matches

After defining matching criteria and importing records, run the Exact/Partial Match Report concurrent process to generate a list of exact or partial matches found between imported and existing records. The concurrent process considers all the person records imported in the last run of the Admission Import Process concurrent process.

This report displays matches found and the person attributes for which they were found. To access the details of the match, refer to [Reviewing Multiple Exact Matches](#) and [Reviewing Partial Matches](#).

Prerequisites

Matching criteria for source types is defined and the Admission Import Process concurrent process is run to import the given group of records.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Exact / Partial Match Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.
The following table describes the Exact / Partial Match Report concurrent process parameters.

Table 3–4 Exact / Partial Match Report Parameters

Parameter	Description
Batch ID	Select the identifier of the group of person records imported from the interface table, for which this report must check exact or partial matches found in person attributes during their import.
Report Type	Select if the concurrent process must report all person attributes for which matches were found during import or only those person attributes with error status that were processed and for which matches were found. The default value is Error.

3.6.3.5 Reviewing Multiple Exact Matches

If the discrepancy rule for a source category is set to **Review**, you can use the Multiple Exact Matching Records Review window to review and compare the discrepancies between the interface record and the other existing records that constitute multiple exact matches.

On reviewing, if administrators establish one of the matched existing record to be that of the same person for whom information is being imported, this record is selected for matching and importing.

On the other hand, if administrators cannot establish which of the matched records belongs to the person whose information is being imported, you can discard the

interface record altogether or import it without matching to overwrite all of the existing records.

Prerequisites

The discrepancy rule of Review is defined for person attributes.

Matching criteria is defined for source types and the Admission Import Process is run for the source type.

Navigation

Admission > Multiple Exact Matching Records Review

Steps

1. Query the latest group of records for which the Admission Import Process concurrent process has been run in the Multiple Exact Matching Records Review window.

The interface table record details are displayed in the header region and the details of the first matched record are displayed in the Matched Records region.

2. Compare the person attributes of the interface record and each of the matched existing records. If it is not clear that the person being imported is the same as that in a matched record, select the appropriate Action radio button.

You can choose to discard the interface record and not import it. Or you can import it without matching and have the interface record details overwrite the details of each of the matched records.

Selecting either of the Action radio buttons other than the default selection of **Review**, disables the Match to Import Record check box for all of the matched records.

3. If you can identify that the person being imported is the same as that in a matched record, select the Match to Import Record check box. This ensures that the record is imported and only information in the existing record that does not match the imported record is updated.
4. Save your work.

3.6.3.6 Reviewing Partial Matches

If the discrepancy rule for a source category is set to **Review**, you can use the Partial Matching Records Review window to review and compare the discrepancies

between the interface record and the other existing records that constitute partial matches.

As in the Multiple Exact Matching Records Review window, administrators must review and decide on a course of action. For information on the prerequisites, and the steps for the possible courses of action and the factors influencing them, refer to [Reviewing Multiple Exact Matches](#).

Navigation

Admission > Partial Matching Records Review

3.6.3.7 Identifying Failed Person Imports

Run the Import Process Person Detail Report concurrent process to generate a list of person records that could not be imported.

The report includes interface person type ID, person type, start date, end date, match indicator, error code, qualification details, and credentials. To display race details, match indicator, statuses, and error codes at the end of the report, set the Statistics parameter to **Yes**.

Prerequisites

Interface tables are loaded with person records and the Admission Import Process concurrent process is run to import person records.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Import Process Person Detail Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Import Process Person Detail Report concurrent process parameters.

Table 3–5 Import Process Person Detail Report Parameters

Parameter	Description
Report Type	Select if the concurrent process must report only records in error status or all records including errors, warnings and pending records. The default value is Error.
Batch ID	You must select the common identifier for the group of person records in the open interface table.
Address Type	Select No to exclude address type.
Address Usage	Select No to exclude address usage.
Statistics	Select No to exclude person statistics.
Qualification Details	Select No to exclude person qualification details.
Contacts	Select No to exclude information on contacts of the person.
Credentials	Select No to exclude person credentials.
Aliases	Select No to exclude person aliases.
Alternate Person IDs	Select No to exclude alternate person identifiers, such as social security number and driving license number.
Special Needs	Select No to exclude special needs.
Employment Details	Select No to exclude employment details.
International Details	Select No to exclude international information.
Health Insurance	Select No to exclude information on health insurance.
Military Details	Select No to exclude military information.
Academic History	Select No to exclude past academic details.
Activities	Select No to exclude information on extra-curricular activities.
Relation Details	Select No to exclude relationships.
Citizenship Details	Select No to exclude citizenship details.
Language Details	Select No to exclude language details.
Recruitment Details	Select No to exclude recruitment details.
Academic Honors	Select No to exclude information on academic honors.
Person Types	Select No to exclude person types.

3.6.3.8 Identifying Errors in Person Import

Run the Import Process Person Details Review Report concurrent process to identify the errors in importing person records. The concurrent process compares imported person records with their matches existing in Oracle Student System to enable you review the errors.

It displays the interface person record with a status of 3 and a match indicator of 20, and the duplicate Oracle Student System person record. It displays all the parameters imported while importing person and person relationships and the details of the exact error or match found. You can choose to exclude parameters from the display.

Prerequisites

Interface tables are loaded with person records and the Admission Import Process concurrent process is run to import person records.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Import Process Person Details Review Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the Import Process Person Details Review Report concurrent process parameters.

Table 3–6 Import Process Person Details Review Report Parameters

Parameter	Description
Batch ID	Select the identifier for the group of records imported by the Admissions Import Process for which you wish to review the matches found.
Address Type	Select No to exclude the imported address type.
Qualification Details	Select No to exclude information on qualification details.
Credentials	Select No to exclude person credentials.
Statistics	Select No to exclude person statistics.

Table 3–6 (Cont.) Import Process Person Details Review Report Parameters

Parameter	Description
Contacts	Select No to exclude person contacts.
Aliases	Select No to exclude person aliases.
Employment Details	Select No to exclude employment information.
International Details	Select No to exclude person international details.
Health Insurance	Select No to exclude information on health insurance.
Military Details	Select No to exclude military details.
Academic History	Select No to exclude past academic details.
Activities	Select No to exclude information on extra-curricular activities.
Citizenship Details	Select No to exclude citizenship information.
Recruitment Details	Select No to exclude recruitment details.
Academic Honors	Select No to exclude information on academic honors.
Person Types	Select No to exclude the default person type.

3.6.3.9 Identifying Matches in Person Relationship Import

The Import Process - Relationships Partial Match Report concurrent process displays a list of matching or duplicate persons found in Oracle Student System while importing person relationships. The report compares the person record in the interface relationship table with the person record in Oracle Student System.

You can create a new person record despite the match. To do this, set the match indicator to the new match indicator of 26, populate this attribute and re run the import process.

Prerequisites

Interface tables are loaded with the relationship records for a person in a group and the Admission Import Process concurrent process is run to import these relationships.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Import Process - Relationships Partial Match Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. Select the identifier of the group of person records imported from the interface table, for which this report must check matches found in person relationships during their import.

3.6.4 Identifying Application Import Failures

Run the Import Process Application Detail Report concurrent process to display the details of all the applications in the imported group. All application data source categories or subcategories such as intent, interest, personal statements, fees, and history, are included in the report. Use the parameters provided to exclude those not required.

Prerequisites

The Admission Import Process concurrent process is run and the required group of applications are imported.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Import Process Application Detail Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the Import Process Application Detail Report concurrent process parameters.

Table 3–7 Import Process Application Detail Report Parameters

Parameter	Description
Report Type	Select the level of reporting. If you do not enter a value, the report will display errors, warnings, and messages.

Table 3–7 (Cont.) Import Process Application Detail Report Parameters

Parameter	Description
Batch Identifier	Select the interface table batch ID for the batch to import.
Applicant Intent	Select No to exclude applicant intent.
Personal Statements	Select No to exclude personal statements.
Academic Interests	Select No to exclude academic interests.
Fees	Select No to exclude fees.
Special Interests	Select No to exclude special interests.
Application History	Select No to exclude application history.
Special Talents	Select No to exclude special talents.
Application Instance History	Select No to exclude application instance history.
Other Interests	Select No to exclude other interests.
Application Program Details	Select No to exclude application program details.
Notes	Select No to exclude application notes.
Educational Goals	Select No to exclude educational goals.
Unit Sets Applied	Select No to exclude desired unit sets.

3.6.5 Reviewing Errors in Application Import

Run the Import Process Application Details Review Report concurrent process to display the discrepancies between the application data subcategories in the interface table records and those imported into the Oracle Student System tables for a given group of imported applications.

All application data source categories or subcategories are included by default. Use the parameters provided to exclude those not required.

You can correct reported discrepancies directly in the interface table record or change the discrepancy rules for the source categories before running the Admission Import Process again.

Prerequisites

The discrepancy rules for all application source categories are set to Review Details.

The Admission Import Process concurrent process is run to import a given group of applications.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Import Process Application Details Review Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the Import Process Application Details Review Report concurrent process parameters.

Table 3–8 Import Process Application Details Review Report Parameters

Parameter	Description
Batch Identifier	Select the interface table batch ID for the applications to import.
Application Intent	Select No to exclude applicant intent.
Academic Interests	Select No to exclude academic interests.
Special Interests	Select No to exclude special interests.
Fees	Select No to exclude fees.
Special Talents	Select No to exclude special talents.
Other Interests	Select No to exclude other interests.
Application Program Details	Select No to exclude application program details.
Notes	Select No to exclude application notes.
Education Goals	Select No to exclude educational goals.
Unit Sets Applied	Select No to exclude desired unit sets.

3.6.6 Identifying Transcript Import Failures

Run the Import Process - Transcript Details Error Report concurrent process to display statuses of imported transcript records in a group.

You can run the report with the report type default value of **All** to display all transcript records for the group including those:

- Pending import
- Unsuccessfully imported
- Imported and awaiting review

To display error codes for transcript records that were not imported properly, run the concurrent process with the report type set to **Error**.

Prerequisites

The Admission Import Process concurrent process is run to import transcripts for the given group.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Import Process - Transcript Details Error Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Import Process - Transcript Details Error Report concurrent process parameters.

Table 3–9 Import Process - Transcript Details Error Report Parameters

Parameter	Description
Report Type	Select the level of reporting required. If you do not enter a value, the report displays all errors, warnings, and information.
Batch Identifier	Select the interface table batch ID for the group of transcript records imported.

3.6.7 Reviewing Errors in Transcript Import

Run the Import Process Transcript Detail Review Report concurrent process to check for discrepancies between the interface table records and imported records for a given group of imported transcripts.

The report displays academic history and transcript details. You can exclude academic history or transcript details if required.

You can correct reported discrepancies directly in the interface table record or change the discrepancy rules for the source categories before running the Admission Import Process again.

Prerequisites

The discrepancy rules for all transcript source categories are set to Review Details.

The Admission Import Process concurrent process is run to import a given group of transcripts.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Import Process Transcript Detail Review Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, refer to the following table.

The following table describes the Import Process Transcript Detail Review Report Concurrent Process Parameters.

Table 3–10 Import Process Transcript Detail Review Report Parameters

Parameter	Description
Batch Identifier	Select the interface table batch ID of the transcript records that were imported.
Academic History	Select No to exclude academic history details.
Transcript Details	Select No to exclude transcript details.

3.6.8 Identifying Failures in the Import of Test Results

Run the Import Process Test Results Detail Report concurrent process to display all test result records processed by the import process for a given group with error codes, where applicable. You can restrict the report to display test results by test types, and exclude test segments.

Prerequisites

The Admission Import Process concurrent process is run to import a given group of admission test results.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Import Process Test Results Detail Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the Import Process Test Results Detail Report concurrent process parameters.

Table 3–11 Import Process Test Results Detail Report Parameters

Parameter	Description
Report Type	Select the level of reporting required. If you do not enter a value, the report displays all errors, warnings, and information.
Batch ID	Select the interface table batch ID of the test result records imported.
Test Segments	Select No to exclude test segments from the report.

3.6.9 Reviewing Errors in the Import of Test Results

Run the Import Process Test Details Review Report concurrent process to check for discrepancies between the interface table records and imported records for a group of imported test results.

You can correct reported discrepancies directly in the interface table record or change the discrepancy rules for the source categories before running the Admission Import Process again.

Prerequisites

The discrepancy rules for all test result source categories are set to Review Details.

The Admission Import Process concurrent process is run to import a given group of transcripts.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Import Process Test Details Review Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. Select the interface table batch ID of the test result records being imported.

3.7 Processing Applications

Administrators process applications by:

- [Defining APC Steps and Rules](#)
- [Tracking Requirements](#)
- [Calculating Academic Indices](#)
- [Reviewing and Rating Credentials](#)
- [Evaluating Applications](#)
- [Screening Applications and Interviewing Applicants](#)

Admission Process Category and Tracking

Each application is assigned an Admission Process Category (APC) that consists of step groups for which you define application-processing steps.

Examples of APC steps for the **Application Outcome** step group are:

- Allow multiple offers
- Override outcome
- Automatic pre-enrollment on offer
- Automatic offer for applications submitted in self-service

You can make APC steps mandatory, such as requiring a personal statement as part of an application submission. You can define pre- and post-admission requirements as APC steps for **Tracking** step group and track them to completion. You can also

create your own tracking types to classify tracking steps. In addition, you can define pre- and post-admission rules to assign additional tracking types to a group of applications in an APC.

Run the Assign Requirements to Application Instances concurrent process to attach these requirements to one or multiple applications.

Applicants must satisfy entry qualifications before an application can be evaluated or the applicant interviewed. Applications must complete pre-admission requirements for an admission offer to be made. In enrollments, administrators can act upon results of post-admission requirements tracking by either denying enrollment or warning the student. For information on tracking post-admission requirements to completion, refer to [Confirming Enrollment and Pre-enrolling Students](#). Applicants are notified about missing items.

Scenario

Vision University creates an APC *UnderGraduate* for processing undergraduate applications. The university defines a tracking type *UGFreshman* that describes application requirements for entering freshmen. These requirements include receipt of response to an essay question and an Scholastic Assessment Test (SAT) result.

The university also defines a tracking type *Art*, which includes requirements specific to Arts majors, including receipt of a portfolio. The university then creates an admission rule to assign tracking type *Art* to Bachelor of Fine Arts program applicants.

A freshman Fine Arts applicant submits an application, which is attached to the *UnderGraduate* APC. When the Assign Requirements to Application Instances concurrent process is run, the tracking types *UGFreshman* and *Art* are assigned to the application.

Evaluating Applications

After an applicant completes pre-admission requirements and satisfies APC steps and rules, evaluators review and rate applications. Applications are first sorted into review profiles and within a profile into review groups to which evaluators are assigned. Administrators then run the appropriate concurrent processes, first to assign review groups to applications and then to assign review group evaluators to the application instances.

Credential ratings, admission test scores, and past academic standing may influence evaluator rating.

Decision makers consider evaluator rating, test scores, past academic standing, and availability of seats before they offer or reject an application.

3.7.1 Defining APC Steps and Rules

Each application is assigned an admission process category (APC) and an associated application type. An APC has seeded step groups for which steps used in processing applications, can be included.

You can also define rules for an APC to be applied either before or after making an admission offer. Pre-admission rules are known as admission processing rules whereas post-admission rules apply after a student accepts the offer.

Defining the method of processing includes:

- [Defining APC Steps for Step Groups](#)
- [Defining Admission-Processing and Post-Admission Rules](#)

3.7.1.1 Defining APC Steps for Step Groups

APC steps are used to process applications until an offer is made. These are included in the Admission Process Category Detail window and can be made mandatory.

For more information on defining an APC, see Admissions in *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Admission processing categories are defined.

Tracking Types are defined.

Navigation

Admission > Admission Setup > Setup Admission Process > Process Category Details

Steps

1. In the Admission Process Category Detail window, query an admission category and APC.
2. Select the required APC step group and for it select required step types.
Enter, if required, the order of processing of each of the steps.

3. To quickly attach steps for other step groups, click **Default Steps**. This assigns all existing process steps to each of the step groups of the new APC. Then delete the steps not needed, as some groups may have conflicting process steps.

Enter, if required, the step order and select Mandatory for steps that applicants must fulfill. For steps with a number restriction, enter the number that it is to be restricted to.

4. Save your work.

3.7.1.2 Defining Admission-Processing and Post-Admission Rules

Use the Admission Process Category Tracking Rules window to define rules for processing applications and post offer rules.

For more information, see Admissions in *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Admission processing categories are defined.

Navigation

Admission > Admission Setup > Setup Admission Process > Process Category Details

Steps

1. In the Admission Process Category Detail window, query the required admission category and APC.
2. Click **Admission Processing Rules** or **Post Admission Rules**. This opens the Admission Process Category Tracking Rules window. In this window, click **Add Rule** and enter the description of the new rule to be created.
3. In the Rule window, click **Options/Validate** to display options for entering the rule text in the Rule Text tab. Select the required option and select the Add Rule Text icon to add the option into the Rule text tab. Continue to use the Options /Validate button alternately with the Add Rule Text button to enter the entire rule.
4. Save your work.

3.7.2 Tracking Requirements

Oracle Student System provides the facility to create and track both pre- and post-admissions application requirements.

Pre- and post-admission requirements are system tracking types for which you can create a set of requirements or tracking type steps. You can attach these directly to an applicant in the Tracking Items window of the Tracking subsystem or manually to an application using the Assign Requirements button in the Applications window.

Alternatively, you can attach requirements to an APC for the APC step group of **Tracking** in the Admission Process Category Detail window. You can then assign these requirements using the APC to applications and to applicants using the Assign Requirements to Application Instances concurrent process. In the process, tracking items with their own tracking ID are created for each applicant.

Tracking requirements involves:

- [Creating APC Tracking Steps](#)
- [Assigning Requirements to an Application](#)
- [Assigning Requirements to a Group of Applications](#)
- [Viewing Requirements Assigned to an Application](#)
- [Completing APC Tracking Items](#)
- [Updating Application Status](#)
- [Identifying Missing or Incomplete Tracking Items](#)
- [Notifying Applicants of Pending Requirements](#)
- [Sending Applicants Missing Items Letters](#)

The institution tracks completion of the pre- and post admission requirements, notifies applicants of missing items, and updates the completion status of the application. Only when an application is complete can evaluation begin.

You can create tracking types separately using the Tracking subsystem or from the Admission Process Category Detail window using the Tracking Types button. Each tracking type will consist of a set of tracking type steps. A tracking item with a tracking ID is created when you assign a tracking type to an application or applicant. You can either do this directly in the Tracking subsystem, manually assign it with an APC for an application and applicant, or use a concurrent process to assign it with an APC for many applications and applicants.

3.7.2.1 Creating APC Tracking Steps

Use the Admission Process Category Detail window to create APC tracking steps for the Tracking step group. You can use existing tracking types or use the Tracking Types button to create new ones.

Prerequisites

Tracking steps and types are defined.

Admission processing categories are defined.

Navigation

Admission > Admission Setup > Setup Admission Process > Process Category Details

Steps

1. In the Admission Process Category Detail window, query an admission category and APC.
2. Select the APC step group of **Tracking** and for it select from created tracking step types. If no step types exist, click **Tracking Type** to create new step types or edit existing ones.

Enter, if required, the order of processing of each of the steps.

3. To quickly attach steps for other step groups, click **Default Steps**. This assigns all existing process steps to each of the step groups of the new APC. Then delete the steps not needed, as some groups may have conflicting process steps.

Enter, if required, the step order and select Mandatory for steps that applicants must fulfill. For steps with a number restriction, enter the number.

4. Save your work.

3.7.2.2 Assigning Requirements to an Application

Use the Assign Requirements button in the Applications window to manually assign the APC tracking requirements to an application instance.

Prerequisites

The required application exists.

Tracking steps for the APC of the application are defined.

Tracking statuses are defined and mapped to system tracking statuses.

Tracking steps are defined for a system tracking step type and attached to a tracking type mapped to a system tracking type.

Navigation

Admission > Direct Admission > Open Application

Additional Notes

- Click **Assign Requirements** in the Applications window to assign the tracking steps to the open application instance, creating a tracking item for the applicant with a tracking ID.
- Requirements can only be assigned to existing and active applications pending completion.

3.7.2.3 Assigning Requirements to a Group of Applications

Use the Assign Requirements to Application Instances concurrent process to assign tracking items to a group of admission applications within an APC. Set the requirement type parameter to admission processing or post-admission requirements.

This concurrent process assigns requirements to application instances with application status other than **Withdrawn**. Running the Assign Requirements to Application Instances concurrent process more than once for an application instance deletes pending tracking items and assigns new requirements, if any.

Enter the type of requirements, either pre-admission or post admission and person number and your name if you are running the request.

You can run the process to assign requirements to:

- Multiple application instances for a single applicant
- One application instance for an applicant
- Application instances for all applicants in a person ID group
- All application instances in a given academic and admission calendar
- Application instances with a given APC in a given academic and admission period

Prerequisites

Applications exist.

Requirements or steps for the Tracking step group are defined for the APC.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Assign Requirements to Application Instances concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, refer to the following table.

The following table describes the Assign Requirements to Application Instances concurrent process parameters.

Table 3–12 Assign Requirements to Application Instances Parameters

Parameter	Description
Person Number	Select to assign requirements to the application instances of this applicant.
Calendar Details	Select to assign requirements to the application instances in this academic and admission calendar.
Admission Process Category	Select to assign requirements to the application instances with this admission process category. Enter values for calendar details and admission process category to assign requirements to application instances in a session.
Admission Application Number	For a given person number, select to assign requirements to application instances of this application. An applicant may have more than one application, each with more than one application instances.
Program	For the application number given above, click on the list of values to automatically populate the program of the application.
Application Instance Number	If the application number given has more than one instance, select one. If only one instance exists, click on the list of values to populate this. You can only enter an application instance number if you have entered an application number and a program code.

Table 3–12 (Cont.) Assign Requirements to Application Instances Parameters

Parameter	Description
Requirements Type	You must select the type of requirements that the process must assign. These can be of type admission processing or of type post admission.
Originator Person	Select the person number and the name of the person running the concurrent process.

3.7.2.4 Viewing Requirements Assigned to an Application

Use the Requirements window to view the requirements assigned to an application.

Prerequisites

Requirements for the APC tracking step group are defined and assigned.

Tracking types, tracking steps and tracking statuses are defined.

Navigation

Admission > Direct Admission

Additional Notes

- To view requirements for submitting an application, query the appropriate applicant, and select the required application in the Direct Admission window. Click **Open Application** and in the Applications window, click **View Requirements**.
- In the Admission Processing tab, view the tracking IDs of the tracking items created, the respective tracking types and the tracking status of the item.
- Change if required the statuses of entry qualification and of application completion.

3.7.2.5 Completing APC Tracking Items

Run the Admission Tracking Item Completion concurrent process to check and update tracking status of each APC tracking item to **Complete**. The concurrent process checks each tracking step or requirement in a tracking item and if all steps are complete, flags the tracking item as completed. A requirement is considered complete if it has a date of receipt. Requirements include official transcripts and in their absence, the unofficial transcripts.

The concurrent process runs only for application instances with application completion status of **Pending** and application outcome status of **Pending** or **Conditional Offer**.

Once all tracking items for an application instance are either complete or cancelled, evaluation begins. To update the application completion status, refer to [Updating Application Status](#).

You can track tracking item completion for:

- The application instances for a single applicant
- A single application instance
- The application instances of applicants in a person ID group
- The application instances in a given academic and admission calendar
- The application instances with a given APC in a given academic and admission period

Prerequisites

Requirements are assigned to application instances.

Tracking statuses and application completion statuses are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admission Tracking Item Completion concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Admission Tracking Item Completion concurrent process parameters.

Table 3–13 Admission Tracking Item Completion Parameters

Parameter	Description
Person Number	Select to track the completion of tracking items for this applicant.

Table 3–13 (Cont.) Admission Tracking Item Completion Parameters

Parameter	Description
Person ID Group	Select to track the completion of tracking items for applicants in this person ID group.
Admission Application Number	Select to track the completion of tracking items for a specific application. You can enter an application number if you have entered a person number.
Program	Click to automatically populate the program of the specified application. You can enter a program if you have entered a person number and an application number.
Application Sequence Number	If the application number specified has multiple instances, select one. If one instance exists, click on the list of values to populate this. You can enter an application instance number if you have entered an application number and a program code.
Calendar Details	Select to track the completion of all the tracking items in this academic and admission calendar.
Admission Process Category	Select to restrict the tracking to application instances in an academic and admission calendar further by their admission process category. Enter values for calendar details and admission process category to restrict the tracking to application instances in a session.

3.7.2.6 Updating Application Status

If the application is pending evaluation and screening, you can manually update the application completion status of an application instance in the Requirements window.

Run the Admission Application Completion concurrent process to check if applications are complete and update the application completion status to **Complete**.

You can run the concurrent process for:

- A single applicant by person number
- A group of applicants in a person ID group
- A single application instance of an applicant

- Application instances in a session

Prerequisites

Requirements are assigned to applications.

Application completion statuses are defined.

Application tracking items are completed.

Navigation

To update the completion status of a single application:

Admission > Direct Admission > Open Application > View Requirements

To update the completion status of many applications:

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admission Application Completion concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Admission Application Completion concurrent process parameters.

Table 3–14 Admission Application Completion Parameters

Parameter	Description
Person Number	Select to run the process for a single applicant.
Person ID Group	Select to run the process for all applicants in this person ID group.
Admission Application Number	Select to run the process for a specific application. An applicant may have more than one application, each with more than one application instance. You can enter an application number if you have entered a person number.
Program	If you have entered a person number and an application number, click to automatically populate the program code for the application.

Table 3–14 (Cont.) Admission Application Completion Parameters

Parameter	Description
Application Sequence Number	<p>If the application number specified has multiple instances, select one. If one instance exists, click on the list of values to populate this.</p> <p>You can enter an application instance number if you have entered an application number and a program code.</p>
Calendar Details	Select to restrict the tracking of application instances for completion to those in this academic and admission calendar.
Admission Process Category	<p>Select to restrict the tracking of application instances in a given academic and admission calendar further by their admission process category.</p> <p>Enter values for calendar details and admission process category to restrict the tracking to application instances in a session.</p>

Guidelines

Application completion statuses are:

- **Pending** if documents not yet assessed (default)
- **Non applicable** if documents are not required
- **Incomplete** if all documents required are not submitted
- **Satisfied** if all documents are submitted and satisfactory
- **Unsatisfied** if documents submitted are unsatisfactory
- **Denied** if an applicant refuses to submit document

3.7.2.7 Identifying Missing or Incomplete Tracking Items

Run the Admissions Completeness Check Report concurrent process to check if application requirements have been completed and all mandatory APC steps have been carried out. The process produces a report listing missing items that must be submitted before applications can be evaluated.

Administrators schedule this concurrent process to run regularly during admission periods. You can run this process when Oracle Student System prevents an offer to be made, by running it for the applicant. You can also run this process in groups or immediate modes during an admission period to check all application instances for a commencement period.

Prerequisites

Required steps are included for an APC.

Requirements are assigned to applications.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admissions Completeness Check Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Admissions Completeness Check Report concurrent process parameters.

Table 3–15 Admissions Completeness Check Report Parameters

Parameter	Description
Runtime Comment	Enter free-format text to appear in the report header.
Start Period	Select an admission calendar start date. The process checks applications that were received on and after this start date.
Admission Process Category	You must select the admission process category used to restrict the checking of applications.
Person Number	Select to restrict the checking of applications to those of this applicant.
Organizational Unit	Select to restrict the checking of applications by the organizational unit responsible for conducting the program.
Program Code	Select to restrict the checking to applications for this program.

3.7.2.8 Notifying Applicants of Pending Requirements

Use the Admission Requirements Notification concurrent process to send notifications to applicants with incomplete requirements.

Select the tracking type of **Admission Processing**, to send applicant notification of incomplete admission requirements.

You can send notifications to:

- All applicants with pending requirements in an academic calendar who belong to a specified person ID group
- All applicants with applications for a particular program or program offering
- All applicants with applications of a particular APC
- A single applicant in a given academic calendar

Prerequisites

Requirements are assigned to applications.

Admission Completeness Check Report concurrent process is run.

Missing items are identified.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admission Requirements Notification concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Admission Requirements Notification concurrent process parameters.

Table 3–16 Admission Requirements Notification Parameters

Parameter	Description
Person Number	Select to send a notification to a specific applicant.
Person ID Group	Select to send notifications to all the applicants in a specific person ID group.
Application ID	Select to send a notification for a specific application. An applicant may have more than one application, each with more than one application instance. You can enter an application ID only if you have entered a person number.
Calendar Details	Select the required admission and academic calendar.

Table 3–16 (Cont.) Admission Requirements Notification Parameters

Parameter	Description
Tracking Type	<p>Select the requirement type of Admission Processing to check for pending admission requirements.</p> <p>To check for pending enrollment requirements, select the requirement type of Post Admission. For information on this refer to, Identifying Incomplete Post Admission Requirements.</p>
Admission Process Category	Select to restrict the process to application instances with a specific APC type.
Application Type	<p>Select to restrict the process to consider application instances with the given APC by this application type.</p> <p>The combination of Calendar Details, APC, and application type restrict notifications to applications in a session.</p>
Program Code	Select to restrict the application instances processed by program.
Location	<p>Select to restrict the application instances processed by the location in which the program is taught.</p> <p>Select a combination of location, attendance type and mode to specify a program offering option. This will limit the check for pending admission requirements to application instances with this program offering option.</p>
Attendance Type	<p>Select to restrict the application instances processed by the attendance type.</p> <p>Select a combination of location, attendance type and mode to specify a program offering option. This will limit the check for pending admission requirements to application instances with this program offering option.</p>
Attendance Mode	<p>Select to restrict the application instances processed by the attendance mode.</p> <p>Select a combination of location, attendance type and mode to specify a program offering option. This will limit the check for pending admission requirements to application instances with this program offering option.</p>

The oracle.apps.igs.ad.appl.adm_req business event is raised when the Admission Requirements Notification concurrent process is run with the tracking type parameter set to admission processing.

This triggers the ADADMREQ/P_ADMREQ workflow process which notifies applicants that they have pending requirements. For more information about this

business event, see *Workflow in Oracle Student System Implementation and Administration Guide*.

For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

3.7.2.9 Sending Applicants Missing Items Letters

Run the Admissions:Missing Items Letter concurrent process to inform applicants of pending requirements. The letter can be for requirements in the current or a future period. It can also be sent to an applicant with no calendar information recorded in the system.

The information can be for requirements in the current or future period. It can also be sent to an applicant with no calendar information recorded in the Oracle Student System.

For details on selecting the applicants to inform, the channels of information, and resending information, refer to [Acknowledging the Receipt of Applications](#). For parameter details and sample report output, see [Admissions - Missing Items Letter Concurrent Process](#) in Correspondence.

Prerequisites

Requirements are assigned to applications.

Admission Completeness Check Report concurrent process is run.

Missing items are identified.

Applicants are notified.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Additional Notes

After applicants submit pending requirements, run the Admissions Completeness Check Report, the Admission Tracking Item Completion, and the Admission Application Completion concurrent processes again.

The first concurrent process will confirm that there are no outstanding missing items, the second will update the tracking status of each tracking item to **Complete** and the last will update the status of the application.

3.7.3 Calculating Academic Indices

An applicant's past academic performance and test scores on admission placement tests can be considered for calculating the academic index. The educational institution may outsource this calculation.

Enter calculated academic indices individually for an applicant in the Indices tab of the Ratings window or run the Import Process Academic Index concurrent process to import them for a group of applicants. View the calculated academic index of the applicant in the Indices tab of the Ratings window.

To import, you must first populate each application record in the IGS_AD_ACAD_IDX_INT interface table with its respective academic index. The concurrent process then transfers all application records pending outcome from the interface table to the Oracle Student System IGS_AD_PS_APPL_INST_ALL target table.

During import, you can encounter error conditions of status 3 given below:

- No corresponding Oracle Student System record found for the given interface table record.
- Corresponding Oracle Student System record is locked by another user.
- Corresponding Oracle Student System application is not complete and has assigned requirements pending.

If such errors are found, the concurrent process proceeds to the next record in the interface table. For more information, see the Academic Index Import Process chapter of the Admissions module in *Oracle Student System Open Interfaces User Guide*.

Prerequisites

Applications are complete.

Application requirements are met.

Applicants' academic history details are available.

Navigation

To enter an applicant's academic index:

Admission > Direct Admission > Open Application > Ratings

To import multiple applicant academic indices:

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Enter the academic index of an individual applicant in the Indices tab of the Ratings window.
2. To import academic indices for a group of applicants, run the Import Process Academic Index concurrent process. Select the interface batch ID of the academic index records to be imported.
3. Apply the parameter and submit the request.

The oracle.apps.igs.ad.acadindex.changed business event is raised every time the academic index is recorded or updated for an application instance.

This in turn triggers the IGSADIDX/P_ACADEMIC_INDEX_CHANGE academic index workflow which sends a notification to the decision maker about the change in the academic index. The decision maker can then use this information to make decisions on admission applications.

3.7.4 Reviewing and Rating Credentials

Credentials can be work samples or letters of recommendation submitted by prospective applicants at the point of inquiry or application. For information on recording credentials, refer to [Accepting Credentials](#).

Credentials are reviewed and rated and decision makers use this information when evaluating an application for admission.

Prerequisites

Credentials are submitted and entered.

Codes for the lookup type PE_CRE_RATING and reviewer person types are defined.

Rating scales and values are defined.

Navigation

Admission > Direct Admission > More > Credentials

Additional Notes

- In the Credentials tab, enter rating for each credential submitted.
- In the Review Details tab, enter the person number of the reviewer and comments or notes.

3.7.5 Evaluating Applications

Completed applications are sorted for evaluation into review profiles and review groups. You can assign evaluators to applications by review group or directly. Evaluators rate applications and decision makers consider these ratings when making admission decisions.

The evaluation process involves:

- [Defining Review Profiles](#)
- [Defining Review Groups](#)
- [Assigning Evaluators to a Review Group](#)
- [Assigning Review Groups to Applications](#)
- [Assigning Evaluators to Applications](#)
- [Entering Evaluator Ratings](#)
- [Approving a Program](#)

A review profile may have many review groups. For example, the basis of an application review profile may be alphabetical by applicant surname, by applicant or institution address, or by program.

Evaluators are assigned to each review group. To assign these evaluators to applications, first run the Assign Review Group to Application Instances concurrent process. This assigns review groups to application instances. Then run the Assign Evaluators to Application Instances concurrent process to assign the evaluators of the review groups to the application instances.

You may choose concurrent or sequential evaluation for a review profile. For sequential evaluation, assign evaluators in sequential order to a review group. You can also manually assign evaluators to an application instance without using review groups, or add new evaluators to those assigned by review group.

Evaluators may, prior to rating an application, be expected to review applicant credentials. Application evaluation may therefore consider applicant past scores, admission test scores, GPA, credential ratings and calculated academic index.

3.7.5.1 Defining Review Profiles

Use the Application Review Profile window to create review profiles based on a selected grouping. For example, an undergraduate review profile can be further sorted by surname, address, program, market, organization, or institution address.

Prerequisites

Application review profiles and rating types are defined.

At least one rating scale is defined for a review profile.

Persons of type Evaluator and Program Approver is defined.

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile

Additional Notes

- A review profile must have at least one evaluator. Select the evaluation type and whether program approval is required.
- Enter details in the header region of the Application Review Profile window and save them before entering the type of rating and rating scale. Rating types can be academic, leadership, or civic and scales can be, alphabetical, or qualitative.

3.7.5.2 Defining Review Groups

Use the Review Group window to create review groups for a review profile and define the range of values to be considered. You can define values in the appropriate tab for the profile grouping. For example, if the profile grouping is by surname you can include all surnames that start with the letters between H and T but exclude all the Smiths and the Joneses.

Prerequisites

Valid review profiles are defined.

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile > Review Group

Additional Notes

When using the include and exclude functionality to define the values for the new review group (code and definition), you can only use the tab that is relevant to the profile grouping. For example, for a profile that is grouped by program, you can only specify values for a review group in the Program of Study tab.

3.7.5.3 Assigning Evaluators to a Review Group

Use the Evaluator window to assign evaluators to the selected profile and review group. If the review profile is by program and the program requires approval, you can assign an evaluator who must also approve the program.

Prerequisites

Review profiles are defined.

Minimum of one review group is defined for the review profile.

Persons of type Evaluator is defined.

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile > Review Group > Evaluator

Additional Notes

- You can assign evaluators to a review profile or group if you have defined at least one rating scale for the profile.
- Only persons with evaluator person type are eligible to evaluate.
- There can only be one program approver for a review group.

3.7.5.4 Assigning Review Groups to Applications

You can manually assign a review profile and group to an application in the Review Group Code tab of the Ratings window. Subsequently running the Assign Evaluators to Application Instances concurrent process assigns evaluators to the application if evaluators were added to the review group.

Or you can run the Assign Review Group to Application Instances concurrent process to assign review groups to a group of applications. You can define parameters to narrow the group of applications to which review groups will be assigned.

The concurrent process only considers applications that have no review groups assigned and assigns to each all the review groups of the given review profile.

You can only assign one review profile to an application. To assign a new review profile when one exists, first remove the existing review profile before running the concurrent process again to assign a new one.

There can be one program approver for a review group.

Prerequisites

- Applications satisfy entry qualifications.
- Review profiles and review groups are defined.
- Evaluators are added to review groups.

Navigation

- To assign a review profile and group to an application:
- Admission > Direct Admission > Open Application > Ratings > Review Group Code**
- To assign review groups to a group of applications:
- Requests > Concurrent Manager > Requests > Run > Single Request**

Steps

1. Run the Assign Review Group to Application Instances concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Assign Review Group to Application Instances concurrent process parameters.

Table 3–17 Assign Review Group to Application Instances Parameters

Parameter	Description
Review Profile Name	Select the review profile to be assigned by the concurrent process.
Entry Status	Select to restrict the assignment of review groups by the entry status of the application instance. Entry statuses are graduate , undergraduate , freshman , returning graduate , undergraduate transfer , and non-degree students.
Nominated Course Code	Select to restrict by program, the application instances to which the review profile will be assigned.
Person Number	Select to assign the review profile to applications for a specific applicant.
Unit Set Code	If you have chosen to restrict by program, select to further restrict by unit set, the application instances to which the review profile will be assigned.

Table 3–17 (Cont.) Assign Review Group to Application Instances Parameters

Parameter	Description
Admission Category	Select to assign the review profile to the applications for this admission category.

3.7.5.5 Assigning Evaluators to Applications

You can manually assign evaluators to a single application in the Assign Evaluators tab of the Ratings window without assigning the application to a review group. If a review group has been assigned, you can assign additional evaluators to the application if assigned evaluators have not yet completed their evaluation.

Run the Assign Evaluators to Application Instances concurrent process to assign evaluators by review group to a group of applications. The concurrent process assigns evaluators to applications that have been assigned review groups but have not been assigned any evaluators.

Each time you run the concurrent process, the system generates one e-mail workflow notification per evaluator for all the application instances assigned. The notification informs the evaluators that they have applications to review and includes the URL for the self-service window where the applications are listed.

Administrators can only assign a review profile and group, and evaluators to a completed application.

Prerequisites

Applications received satisfy entry qualifications.

Review profiles, review groups and evaluators for each review group are defined.

Rating types and rating scales are defined.

The Assign Review Group to Application Instances concurrent process is run to assign review groups to applications.

Navigation

To assign evaluators to a group of applications:

Requests > Concurrent Manager > Requests > Run > Single Request

To assign evaluators to a single application:

Admission > Direct Admission > Open Application > Ratings

Steps

- 1. Run the Assign Evaluators to Application Instances concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the Assign Evaluators to Application Instances concurrent process parameters.

Table 3–18 Assign Evaluators to Application Instances Parameters

Parameter	Description
Review Profile Name	Select to assign evaluators to application instances for a specific review profile.
Review Group Code	Select to further restrict the process to application instances for a specific review group.
All Unassigned Applications	Select Yes to process all application instances that have not been assigned evaluators. Select No if you have entered values for review profile name and review group code.

- 3. Manually assign evaluators to a single application in the Assign Evaluators tab of the Ratings window. Define what the applicant is to be rated on and the scale that each evaluator must use while rating.

You can only add evaluators at the end of the sequence to an application that has been assigned a review profile with sequential evaluation. This means that the last evaluator in the list must have entered ratings in the Enter Evaluation tab and all ratings must be closed.

The oracle.apps.igs.ad.appl.eval_appl business event is raised when the Assign Evaluators to Application Instances concurrent process is run, or when you enter and commit evaluators directly in the Assign Evaluators tab of the Ratings window.

This triggers the ADEVAPPL/P_EVALAPPL workflow process which notifies evaluators that applications are ready for their evaluation and ratings. See Workflow in *Oracle Student System Implementation and Administration Guide* for information about this business event. For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

3.7.5.6 Entering Evaluator Ratings

Use the Enter Evaluation tab of the Ratings window to enter various application ratings in the field of academics and leadership, for example.

Prerequisites

Rating types, scales and values are defined.

Entry qualifications are satisfied.

Navigation

Admission > Direct Admission > Open Application > Ratings > Enter Evaluation

Steps

1. Select **All** from the View Sequence list to display all evaluators assigned for sequential evaluation. Select the Do Not Send Notification check box to prevent notifications to evaluators. The Do Not Send Notification check box does not apply for concurrent evaluations. If an evaluator is added after all assigned evaluators have entered ratings, no notification is automatically sent to the new evaluator.

If an application instance has concurrent evaluation or has no review group assigned, different evaluators can concurrently or simultaneously enter ratings for the same application instance. If an application instance is sequential, then the evaluations must be entered in the defined sequence.

2. Save your work.
3. Optionally, log in as faculty in self service, review applications that are ready for rating, and enter ratings directly in the Rate Application page. Evaluators can also have an administrator enter their ratings in self-service.

3.7.5.7 Approving a Program

A review profile may be identified as requiring program approval. For such profiles, either assign a program approver to an application by review group or directly enter a program approver for an application in the Program Approval tab of the Ratings window.

To assign program approvers by review group, select an assigned evaluator as the program approver for the group. Then run the Assign Review Group to Application Instances and the Assign Evaluators to Application Instances concurrent processes.

Alternatively, you can manually enter the review profile and group for an application in the Review Group Code tab of the Ratings window. Then run the Assign Evaluators to Application Instances concurrent process.

Program approval is usually done after the evaluators finish rating the applications. However, program approval can be done before rating has been completed.

If the approver is also an evaluator, rating and approval can be entered at the same time.

Prerequisites

Applications are complete.

Entry qualifications are satisfied.

Evaluators and program approvers are assigned to applications.

Applications are rated by evaluators.

Navigation

Admission > Direct Admission > Open Application > Ratings > Program Approval

Additional Notes

- Approval is indicated by changing the approval status from **Pending** to **Approved**.
- Program approval is usually done after the evaluators finish rating the applications. However, you can set up the application processing mechanism to make sure that ratings can be done after the program is approved.
- If you have defined program approval as a mandatory step for application processing, an admission offer cannot be made to the applicant.

3.7.6 Screening Applications and Interviewing Applicants

Screening and interviews can be done during application processing or reviewing. If done before processing, evaluators can consider interview decisions and notes while rating.

Before screening and interviews can happen, appropriate panels must be created and panel members assigned. You can either assign applicants and their application instances to a panel or assign panels to an application instance and applicant.

The process of screening and interviewing consists of:

- [Creating Screening/Interview Panels](#)
- [Adding Members to a Panel](#)
- [Assigning Applicants to a Panel](#)
- [Assigning Panels to an Application](#)
- [Entering Screening Decisions](#)
- [Scheduling Interviews](#)
- [Sending Applicants Interview Letters](#)
- [Entering Interview Decisions](#)
- [Entering Screening or Interview Notes](#)

Screening is the pre-interview review process where either panel members or the panel as a whole decide if the applicant should be interviewed. Individual decisions and notes are recorded and collated for a final screening decision.

If the final decision is to grant the applicant an interview and if the level is set to **Panel Member** then members of the interview panel individually interview the applicant and enter their decisions and notes. All individual decisions are collated to enter the final interview decision.

If you set the interview level to **Panel**, the panel conducts the interview and only one final decision is recorded.

You can assign one or more panels to an application instance. Each member of the panel has a designated role. This can be as reviewer, final approver or tutor. The final approver or tutor consolidates all member decisions to arrive at the final panel decision.

To ensure every application is screened before applicants are interviewed, include the APC step of **Screening Required Before Interview** for the **Application Validation** step group in the Admission Process Category Detail window.

3.7.6.1 Creating Screening/Interview Panels

Use the Interview Panel window to create new panels for screening or interviews.

Navigation

Admission > Admission Setup > Setup Application > Interview Panel

Steps

1. Select the panel type, **Screening** or **Interview**.
2. Enter a code and name for the panel.
3. For an interview panel, select the required level. Select **Panel** for a single interview and decision. Select **Panel Member** for individual member interviews and decisions. The panel member assigned the responsibility of tutor or approver collates these independent decisions.
4. If the descriptive flexfield has been customized, enter panel details and save your work.
5. Select the Close check box to prevent any application instances being assigned to the panel.
6. Save your work.

3.7.6.2 Adding Members to a Panel

Use the Panel Members window to add members to a new panel. Enter the person number, name and role of the reviewer. Examples of roles include Admission Tutor and Admissions Approver.

You can also add members to a panel after you assign it to an application instance. For more information, refer to [Assigning Panels to an Application](#).

Prerequisites

Screening and interview panels are defined.

Roles for screening (screen_role_type) and for interview (INTERVIEW_ROLE_TYPE) are defined.

Navigation

Admission > Admission Setup > Setup Application > Interview Panel > Panel Members

Additional Notes

You can return later to add or remove members from the panel. You cannot add or remove members from the panel after a final screening decision is entered.

3.7.6.3 Assigning Applicants to a Panel

You can assign many applicants and their application instances to a panel in the Interview Panel Details window. Applicants and applications are assigned for screening first and then for interviews.

Prerequisites

Completed applications exist.

Screening and interview panels, and panel members are defined.

Navigation

Admission > Admission Setup > Setup Application > Interview Panel

Steps

1. Select the panel in the Interview Panel window to which applicants and application instances are to be assigned.
2. Click **Interview Panel Details**.
3. For a screening or interview panel with the level **Panel**, select the person number of the applicant in the Application Instance tab of the Interview Panel Details window.

For an interview panel with the level **Panel Member**, select the person number of the applicant in the Member Interview Details tab of the Interview Panel Details window.
4. Click the Application Instance Details icon to enter application instance details of the selected applicant. A set of interview details is associated with one application instance.
5. Repeat steps 3 and 4 to assign additional applicants and application instances to the same panel.
6. Save your work.

3.7.6.4 Assigning Panels to an Application

Use the Interview Details window to assign panels for screening and interview to a single application.

Prerequisites

Specifying interview details is included as a step for application processing.

A final screening decision of Interview from at least one panel assigned to the application exists if the Screening Required Before Interview APC step has been included for the Application Validation step group.

Screening and interview panels are defined.

Roles for screening (screen_role_type) and for interview (INTERVIEW_ROLE_TYPE) are defined.

Navigation

Admission > Direct Admission

Steps

1. Query for an applicant in the Direct Admission window. Select the application instance that requires screening and click **Open Application**.
2. In the Applications window, click **More** and then **Interviews**.
3. In the Interview Details window, select from existing open screening or interview panels and assign these to the application instance in the Screening or Interview tabs.
4. Save your work.

On saving, if the panel has members, the member details are displayed.

To add a member, select the person number and assign the appropriate role.

5. Enter the decision as pending or outstanding.
6. Save your work.

3.7.6.5 Entering Screening Decisions

Use the Interview Details window to enter the individual screening decisions of panel members in the Screening tab. Collate these to enter a final decision for the panel in the Final Screening Decision tab.

If the panel consists of one member, the member's decision is the same as that of the panel and can be entered directly in the Final Screening Decision tab.

To enable screening before interviewing, include the APC step of **Screening Required Before Interview** for the **Application Validation** step group.

Prerequisites

Possible individual and panel screening outcomes or decisions are defined.

Roles for screening (SCREEN_ROLE_TYPE) are defined.

Specifying interview details is included as a step for application processing.

Navigation

To enter the screening decisions for an application:

Admission > Direct Admission > Open Application > More > Interviews > Screening/Final Screening Decision

To enter the screening decisions for all the applications assigned to a screening panel:

Admission > Admission Setup > Setup Application > Interview Panel > Interview Panel Details > Open Interview Details > Screening/Final Screening Decision

Steps

1. If the panel has members, enter the individual decision of each member in the Screening tab of the Interview Details window.

A panel member with the appropriate role type collates the decisions and enters the final decision for the panel in the Final Screening Decision tab. Examples of roles types include Admission Tutor and Approver.

You cannot add members to the panel, or update member decisions or notes after a final screening decision is entered. You cannot update a member screening decision of **Voided**.

2. Save your work.
3. The oracle.apps.igs.ad.interview.finalscreening business event is raised when a final screening decision changes from **Pending** to any other in the Interview Details window. See *Workflow in Oracle Student System Implementation and Administration Guide* for information about this business event.

You can subscribe to this business event to attach an appropriate workflow or notification if required.

For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

Guidelines

Final screening decisions are:

- **Abstain:** Reviewer does not wish to enter a decision.
- **Interview:** Application that qualifies for an interview.
- **Pending:** Default for an application that will be screened.
- **Reject:** Application that does not qualify for an interview.
- **Voided:** Application is invalid and does not merit screening.
- **Waitlist:** Reviewer will screen the application at a later date.

3.7.6.6 Scheduling Interviews

Use the Interview Details panel to schedule interviews. For a single-member interview panel, enter details such as date, time, location, and room at the panel level. For a Panel Member level interview panel, use the Member Interview Details window to enter details separately for each panel member.

Use the Interview Panel Details window to schedule interviews by a panel with various applicants. For a single-member interview panel use the Panel Interview Details tab. For an interview panel with more than one member, use the Member Interview Details window.

If the panel is not at member level, the Interview Panel Details window displays the Application Instance tab and the Panel Interview Details tab. Use the first tab to assign applicants and applications to the panel. Use the second tab to enter the interview details for the panel. If the panel is at member level, the Interview Panel Details window only displays the Member Interview Details tab where you can assign applicants and their application and assign the members of the panel.

Prerequisites

If the Screening Required Before Interview APC step is included, then a final screening decision of Shortlisted for Interview exists from at least one panel.

Possible individual and panel interview outcomes or decisions are defined.

Roles for interview (INTERVIEW_ROLE_TYPE) are defined.

Navigation

To schedule interviews against screened application instances of a single applicant:

Admission > Direct Admission

To schedule interviews for all the applicants assigned to a panel:

Admission > Admission Setup > Setup Application > Interview Panel

Steps

1. To schedule interviews, query the applicant in the Direct Admission window.
2. Select the required application instance and click **Open Application**.
3. In the Applications window, click **More**, and then click **Interviews**.
4. In the Interview tab of the Interview Details window, enter the time, date, location and room for the interview against the assigned panel if the level is set to Panel. Otherwise select the panel member and click **Member Interview Details** to enter interview details for each panel member in the Member Interview Details window.
5. To schedule interviews for all the applicants assigned to a panel, select the required panel in the Interview Panel window and click **Interview Panel Details**.
6. If the level is set at Panel, in the Panel Interview Details tab of the Interview Panel Details window, enter interview details once only for each of the assigned applicants.

If the level is set to Panel Member, in the Interview Details window, enter against each assigned applicant interview details by panel member.
7. Save your work.

3.7.6.7 Sending Applicants Interview Letters

Run the Admissions: Interview Details Letter concurrent process to send letters informing applicants of their interview schedules.

You can send interview letters to:

- A single shortlisted applicant
- All shortlisted applicants in a person ID group
- All shortlisted applicants in a list
- All shortlisted applicants by session
- All shortlisted applicants by program offering option

For details on selecting the applicants to inform, the channels of information, and resending information, refer to [Acknowledging the Receipt of Applications](#). For parameter details and sample report output, see [Admissions - Interview Details Letter Concurrent Process](#) in Correspondence.

Prerequisites

Screening and interview panels are defined and members are assigned to these panels.

Applications are complete, screened, and applicants are scheduled for interviews.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

3.7.6.8 Entering Interview Decisions

Use the Interview Details window to enter interview decisions. If the level is set to Panel, enter one final decision for the panel in the Final Interview Decision tab.

If the level is set to Panel Member, enter the individual decisions of each of the panel members in the Interviews tab. The approver of the panel then collates the individual decisions to enter the final decision of the panel in the Final Interview Decision tab.

Prerequisites

If the Screening Required Before Interview APC step is included, the final screening decision from at least one of the assigned panels must be Shortlisted for Interview.

Possible individual interview outcomes and panel interview outcomes are defined.

Roles for interviewers (INTERVIEW_ROLE_TYPE) are defined.

Navigation

To enter interview decisions for an application:

Admission > Direct Admission > Open Application > More > Interviews > Interview/Final Interview Decision

To enter interview decisions for all the applicants assigned to an interview panel:

Admission > Admission Setup > Setup Application > Interview Panel > Interview Panel Details > Open Interview Details > Interview/Final Interview Decision

Additional Notes

- If the panel has members, enter the individual decision of each member in the Interview tab of the Interview Details window.

- A panel member with the appropriate role type collates the decisions and enters the final decision for the panel in the Final Interview Decision tab.
- You cannot add members to the panel, or update member decisions or notes after a final interview decision is entered. You cannot update a member screening decision of **Voided**.
- The oracle.apps.igs.ad.interview.finalinterview business event is raised when the final interview decision changes from **Pending** to any other in the Interview Details window. See Workflow in *Oracle Student System Implementation and Administration Guide* for information about this business event.
- You can subscribe to this business event to attach an appropriate workflow or notification if required. For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

Guidelines

Final interview decisions are:

- **Abstain**: Application that the reviewer does not wish to enter a decision on.
- **Accept**: Application that qualifies for admission.
- **Pending**: Default for an application to be interviewed.
- **Reject**: Application that does not qualify for admission.
- **Voided**: Application that is invalid and does not merit interview.
- **Waitlist**: Application that the reviewer intends to interview later.

3.7.6.9 Entering Screening or Interview Notes

Comments can be entered and viewed by the panel member.

Prerequisites

Applications are screened.

Applicants are interviewed.

Navigation

Admission > Direct Admission > Open Application > More > Interviews > Screening/Interview > Notes

Additional Notes

- In the Interview Notes or Screening Notes window you can enter comments during the screening or interview process.
- A panel member can version the screening or interview notes and can view all the previous versions and add newer versions of the notes.

3.8 Making Admission Decisions

On completion of evaluation and processing, an application is ready for a decision. Follow-up steps after an offer is made can include notifying the applicant, processing responses to the decision, and processing an enrollment deposit or fee.

The process of admitting students includes:

- [Reviewing Decision Inputs](#)
- [Offering Final Unit Sets](#)
- [Offering Units](#)
- [Recording Decisions](#)

If the institution makes an offer, it must set a date by which the applicant must respond. Administrators can set an offer response date alias for an admission period and category and define the offset period of this. Administrators can update the date defined for offer response at the student level if necessary, for example, to accommodate a special consideration that has been given.

Once an offer is made, the institution tracks post-admission requirement completion, sending letters out to applicant for missing items. Pre-enrollment may occur if the APC of the application includes the **Perform Pre-enrollment On Offer** step. This creates an unconfirmed student program attempt in enrollments.

Administrators can manually make an offer on an application or make offers on multiple applications for a group of applicants by importing admission decisions. To make offers in groups, administrators must first group person records in the interface tables with unique batch IDs and batch descriptions.

When admission decisions or outcomes are imported or manually updated from conditional offers to offers, Oracle Student System checks if the country code has been set to UK and confirms if the application is a Universities & Colleges Admissions Service (UCAS) application. For UCAS applications, while importing a decision of **Offer**, Oracle Student System checks if it needs to update the offer response status to **Accepted** and does so, if required.

Unit sets and units can be offered before an offer is made to enable this information to be copied into the Enrollments subsystem during pre-enrollment.

3.8.1 Reviewing Decision Inputs

An application must satisfy entry qualifications, complete all requirements, and be evaluated for an outcome to be recorded. Criteria considered for admission include besides applicant merit, past academic standing, evaluator rating, credentials, and interview decisions, logistic details of program and seat availability. Decision makers may decide to admit the applicant to a future term depending on the policies of the institution.

Reviewing inputs before making a decision involves:

- [Considering Academic Indicators](#)
- [Viewing Credentials and their Ratings](#)
- [Viewing Probability Values](#)
- [Viewing Transcript Information](#)
- [Viewing Admission Test Summary](#)
- [Viewing Application Ratings](#)
- [Viewing Interview Decisions and Notes](#)
- [Viewing Application Summary](#)

3.8.1.1 Considering Academic Indicators

The academic index of an applicant is calculated based on past academic performance. For information on entering or importing academic indices, refer to [Calculating Academic Indices](#).

Prerequisites

Academic index is calculated and recorded.

Navigation

Admission > Direct Admission

Steps

1. Query the applicant in the Direct Admission window.

2. Select the required application instance and click **Open Application**.
3. In the Applications window, click **More** and then click **Key Academic Indicators**.
4. View the applicant's academic index.
5. Close the window.

3.8.1.2 Viewing Credentials and their Ratings

A prospective student or applicant may have submitted work samples, letters of recommendations, and other references. Use the Credentials tab of the Credentials window to view the credentials submitted, ratings given, and notes recorded by reviewers.

For information on entering credentials, refer to [Accepting Credentials](#). For information on rating credentials, refer to [Reviewing and Rating Credentials](#).

Prerequisites

Credentials are entered and reviewed.

Navigation

Admission > Direct Admission > More > Credentials

3.8.1.3 Viewing Probability Values

Use the Probability Index tab of the Recruitment window to view calculated probability values of a prospective student applying and enrolling.

For information on entering probability values, see [Recording Prospect Probability](#) in Inquiry.

Prerequisites

Probability types and sources are defined.

Probability values are calculated and entered.

Navigation

Admission > Direct Admission

Steps

1. Query the applicant in the Direct Admission window.

2. Click **More** and click **Recruiting**.
3. In the Probability Index tab of the Recruitment window, view calculated values for probability of applying and enrolling that have been imported or entered.
4. Close the window

3.8.1.4 Viewing Transcript Information

Use the Academic History Details window and the Transcript Summary window to see the institutions attended, programs completed, rank in class, class size, unit credit and grade points, and converted GPA for all the transcripts of an institution.

Prerequisites

Applicants have attempted programs at other institutions, earned degrees, and submitted transcripts the details of which are recorded.

Navigation

Admission > Direct Admission

Steps

1. Query the applicant in the Direct Admission window.
2. Click **More** and then click **Academic History**.
3. In the Academic History Details window, select an institution and click on the History Details tab to view the program studied and degree earned.
4. Click on the Self Reported Details tab to view actual GPA, grade and credit points earned. Use the Recalculated Details tab to view converted GPA, grade and credit points.

Alternatively, click **Transcript Summary** to view the different types and statuses of transcripts received, applicant's rank, class size, and earned and converted GPAs at a glance in the Transcript Summary window. You can sort transcript details either by date of receipt or by transcript type if official or unofficial.

5. Close the window.

3.8.1.5 Viewing Admission Test Summary

Navigate to the Admission Test Summary window to review the applicant's test scores.

For more information on admission tests, refer to [Entering Admission Test Results](#).

3.8.1.6 Viewing Application Ratings

Navigate to the Enter Evaluation tab of the Ratings window to review how evaluators rated the application.

For more information on this tab, refer to [Entering Evaluator Ratings](#).

3.8.1.7 Viewing Interview Decisions and Notes

Navigate to the Final Interview Decision tab of the Interview Details window to review the decision. You can also review individual decisions of panel members in the Interview tab and look at any notes and comments recorded.

For more information on interview, refer to [Entering Interview Decisions](#).

3.8.1.8 Viewing Application Summary

Use the Application Summary Details window to review the inputs for each of the applications in a group in the interface tables.

Prerequisites

Applications satisfy entry qualifications.

Applications satisfy requirements.

Applications are evaluated.

Transcript information and test scores are available and academic indices are calculated.

Outcome statuses are defined.

Navigation

Admission > Admission Decision Details

Steps

1. Query the group of applications in the Admission Decision Details window, select the application and click **Application Summary Details**.
2. Use the Application Summary Details window to navigate to other windows for more information on the applicant.

Click:

- **Ratings** to view evaluation details of application
- **Admission Tests** to view test scores of applicant
- **Academic History** to view academic history and transcript details of applicant
- **Key Academic Indicators** to view GPA, class rank, and academic index of applicant

3. Close the windows.

3.8.2 Offering Final Unit Sets

For an application instance, an applicant can choose to study certain unit sets. If unit sets are attached to the program, the applicant must choose from these.

The decision maker decides on the final unit set that the applicant can enroll in. This may or may not have any reference to the applicant's preference of unit sets. For one stop applications received through self-service, administrators must set up the profile option IGS_AP_DERIVE_FINAL_US to specify the method of deriving the final unit set.

The applicant's academic history, credential ratings, and admission test scores can influence the decision to deny or offer the unit set.

Offering a final unit set involves:

- [Viewing Applicant's Preference of Unit Sets](#)
- [Entering the Final Unit Set for an Application Instance](#)

3.8.2.1 Viewing Applicant's Preference of Unit Sets

Use the Desired Unit Sets window to view an applicant's preference of unit sets before deciding on which unit set to offer the applicant.

Prerequisites

Applicants' desired unit sets are recorded.

Navigation

Admission > Direct Admission

Steps

1. Query an applicant in the Direct Admission window, select the required application and click **Open Application**.
2. In the Applications window click **Desired Unit Sets** to view unit set preferences of the applicant.

To enter an applicant's choice of unit sets, refer to [Entering Desired Unit Sets](#).

3. Close the window.

3.8.2.2 Entering the Final Unit Set for an Application Instance

Use the Applications window to offer the applicant the unit set to enroll in. If unit sets are attached to the program that the applicant has applied to, select the appropriate one from the list.

Prerequisites

The Program Unit Set APC step is included for the Program Validation step group.

An offer for the application instance is imminent.

Navigation

Admission > Direct Admission

Steps

1. Query the applicant in the Direct Admission window.
2. Select the application for which the final unit set is to be decided on and click **Open Application**.
3. Select the final unit set to be offered.
4. Save your work.

3.8.3 Offering Units

An applicant can choose for a unit, the unit class, location and teaching calendar. Decision makers can either offer or deny the unit and unit classes that the applicant chose. To decide, decision makers can check the applicant's test scores against a score range identified by the educational institution and units recommended for placement.

Units for placement can be recommended against scores achieved for a test or for components or segments of a test. The minimum and maximum scores for the range must be set up in the Unit Placement window. For more information, see *Oracle Student System Implementation and Administration Guide*.

The applicant's academic history and credential ratings can also influence the decision to deny or offer a unit.

Offering units involves:

- [Viewing Recommended Units](#)
- [Viewing Applicant Test Scores](#)
- [Viewing Applicant Unit Outcomes](#)
- [Entering Unit Outcomes](#)

3.8.3.1 Viewing Recommended Units

Educational institutions may require applicants to complete a standardized test or tests, such as the Scholastic Assessment Test (SAT) before admitting them. Tests can be admission tests for a particular program or language tests for international applicants.

In such cases, the institution specifies an optimum range of scores that applicants must achieve in a test or test segment and for such applicants recommends units that they can be placed in. Use the Unit Placement Details window to view units that your institution recommends placement in based on an applicant's admission test results in a test type or segment.

Test segments are parts of a test that measure different aptitudes, skills, or knowledge. For example, for the Scholastic Assessment Test, the Math and Verbal components are test segments.

Prerequisites

Test types and segments are defined.

For a test segment, an optimum score range and recommended placement units are defined.

Navigation

Admission > Direct Admission

Steps

1. Query the applicant in the Direct Admission window, click **More** twice and click **Unit Placement**. View units recommended for segments of a test in the Unit Placement Details window.
2. You can view recommended units by test or segments.
3. Close the window.

3.8.3.2 Viewing Applicant Test Scores

Navigate to the Admission Test Summary window to view an applicant's test scores for each segment of a test or for more information, refer to [Viewing Admission Test Summary](#).

If the applicant's scores fall within the optimum range defined in the Unit Placement Details window, offer the applicant the units per recommendation. For more information on this window, refer to [Viewing Recommended Units](#).

3.8.3.3 Viewing Applicant Unit Outcomes

Use the Admission Program Application Instance Unit History window to check the units pending outcomes for an applicant.

Prerequisites

Unit preferences of applicants for a program are recorded.

Unit outcome statuses are defined.

Navigation

Requests > Admissions History > Program Application Units

Steps

1. Query an applicant in the Admission Program Application Instance Unit History window. For each unit view unit details and the changes in unit outcome.
2. Close the window.

3.8.3.4 Entering Unit Outcomes

Having considered test scores and unit placement recommendations, use the Direct Admission Unit window to offer or deny the units that an applicant has chosen.

Prerequisites

Units to be completed for a unit set or unit set completion rules are defined.

Unit outcome statuses are defined.

Navigation

Admission > Direct Admission

Steps

1. Query the applicant in the Direct Admission window.
2. Select an application and click **Open Application**.
3. In the program application instance region of the Applications window, click **More** and click **Unit**.
4. In the Direct Admission Unit window, enter for the units that the applicant had chosen the appropriate unit outcome to either offer or deny an applicant the units pending outcome.

To enter the applicants choices of units and unit classes in a location and teaching calendar, refer to [Selecting Units and Unit Classes](#).

5. Save your work.

3.8.4 Recording Decisions

Decision makers after having considered all input, must decide whether to offer admission or reject the application. An offer can be straight, subject to conditions that the applicant must meet, waitlisted, or made for a future term. Future Term offer for admission can be made due to seat unavailability in the present term, or due to applicant's request for deferment of the offer, or due to unavailability of applicant's choice of program, unit sets and unit in the present term.

For more information on possible outcomes or admission decisions, refer to the Additional Notes in [Entering an Application Outcome](#).

Outcomes or decisions can be made for a single application or for a group of applications and posted. Decisions can later be overridden or discarded.

Decision makers must enter the reason for the decision and set a deadline by when applicants must respond to the offer made. If required, decision makers can record notes or comments on the decision.

Recording decisions involves:

- [Entering an Application Outcome](#)
- [Entering Decision Notes](#)
- [Posting Admission Decisions](#)
- [Entering Decision Details for Multiple Applications](#)
- [Discarding and Overriding Decisions](#)
- [Notifying Applicants of Outcome](#)
- [Viewing Correspondence History](#)
- [Requesting Reconsideration of Applications](#)

3.8.4.1 Entering an Application Outcome

Use the Application Outcome window to enter the outcome or admission decision for a single application. Enter the reason for the decision, the person number of the decision maker and the date of the decision.

If an offer or conditional offer is being made, the offer response deadline is derived in the following order:

- As the admission period date override value given for either the APC, program, or program offering option.
- From the offset days given for the APC added to the date of offer.
- As the minimum absolute value of those given as the offer response date alias for the given admission period (admission calendar and effective dates).

Outcome details entered depend on the outcome selected. For example:

- A waitlist status is necessary if the offer is a waitlisted offer.
- Conditions and conditional offer status are required for a conditional offer and on the applicant meeting the conditions, you must override the application outcome to that of a firm offer.
- Future academic and admission calendars are required for a future term offer.
- A possible reason for pending is required if the outcome is kept pending.

Only offers or conditional offers can be later withdrawn or voided. An application once cancelled, withdrawn, or voided cannot be modified or reverted. You can directly cancel an application that is pending outcome.

Prerequisites

Applications satisfy entry qualifications and are complete.

Application outcomes, decision and pending reasons, and waitlist and conditional offer statuses are defined.

Individuals authorized to make decisions are defined.

APCs, offer response offset days for an APC, admission periods, date aliases, and absolute values for the offer response date aliases for admission periods are defined. If required, admission period date overrides for offer response for an APC, program, or program offering can be defined.

Navigation

Admission > Direct Admission > Open Application

Steps

1. Click **Outcomes** to enter admission decision on an application with reason for the decision in the Application Outcome window.

For an application outcome of *Future Term*, enter the future admission and academic calendar in which the new application will be created.

If the application is placed on a waitlist for offer, the waitlist status defaults to **Pending**. When waitlisted applicants are considered, update the waitlist status to **Active** and enter waitlist number or rank of applicant.

If the application is to be given special consideration, enter the special admission category and any relevant notes in the Special Consideration tab.

For a straight offer, enter the date by which the applicant must respond to the offer in the Offer Deadline tab.

For a conditional offer, enter the conditions and the date by which the applicant must satisfy the conditions in the Conditional Offer tab.

To cancel an application instance and prevent further use of it, use this window to change the application outcome status from **Pending** to **Cancel**. For more information on creating applications, refer to [Creating an Application Instance](#).

2. Save your work.

On saving the oracle.apps.igs.pe.rescal.io business event is raised. This business event triggers the IGSADOUD/P_OUTCOME_STATUS_CHANGE workflow

which sends a notification to the administrator alerting them to the change in the outcome status. This happens every time a decision is entered or updated.

You can customize the workflow. During implementation the system administrator will have to define a role for the workflow, to specify who is to receive the workflow notification. Financial Aid uses this information to process awards.

Additional Notes

Application outcome statuses that reflect admission decisions include the following:

- **Pending:** For an application under consideration.
- **Offer:** For a clear cut offer of admission.
- **Conditional Offer:** For an offer of admission subject to the meeting of given conditions.
- **Future Term:** For an offer of admission in a future term due to unavailability of applicant's choice of program, unit sets and unit in the present term.
- **Waitlist:** For a possible offer of admission in the event of another offer being declined and the seat consequently becoming available for this applicant.
- **No-Quota:** For unavailability of seats.
- **Rejected:** For no offer of admission.
- **Withdrawn:** For an offer of admission made that is later withdrawn for example, due to fraudulent documents supplied.
- **Voided:** For offer of admission revoked with administrative hold applied on applicant.
- **Suspended:** As an intermediary status after an offer is made and before final irreversible decision to withdraw is taken.
- **Cancel:** For a cancelled application instance that is not to be used any further.

3.8.4.2 Entering Decision Notes

Decision makers can enter comments or additional remarks on a decision in the Decision Notes window.

Prerequisites

An admission decision for an application is made.

Application note types are defined for the seeded note category of Decision.

Navigation

Admission > Direct Admission

Steps

1. Query the applicant in the Direct Admission window, select the appropriate application offered and click **Open Application**.
2. Click **Outcomes** in the Applications window.
3. Click **Decision Notes** in the Outcome tab of the Application Outcome window and then click **Edit Notes** in the Decision Notes window to enter additional information on admission decision or application outcome.
4. Save your work.

3.8.4.3 Posting Admission Decisions

Use the Admission Decision Details window to enter the outcomes or decisions for a group of applications in the interface tables.

You can save these outcomes and use the Post Decisions button to transfer these decisions from the interface tables to Oracle Student System tables.

Prerequisites

A group of completed applications exists in the interface table identified by a batch ID.

Application outcomes are defined.

Navigation

Admission > Admission Decision Details

Steps

1. Query the appropriate group of applications by ID in the Admission Decision Details window.
2. Enter the application outcomes for each of the applications in the group.

Before entering an outcome, click **Application Summary Details** if you need to view application details, ratings, credentials, academic history, and navigate

further to view more academic information. For details, refer to [Viewing Application Summary](#).

3. If the APC step for Reconsideration is turned on and the outcome status is **Rejected** or **No-Quota**, select the Request for Reconsideration check box in this window to flag these applications for possible reconsiderations and a change in application outcome later.

4. Save your work.

This saves the application outcomes in the interface table application records.

5. Enter decision details and click **Post Decisions** to post decisions and decision details from the interface tables to Oracle Student System tables. For information on entering decision details, refer to [Entering Decision Details for Multiple Applications](#).

For information on the business event raised and the workflow triggered every time a decision is entered or updated, refer to the last step in [Entering an Application Outcome](#).

3.8.4.4 Entering Decision Details for Multiple Applications

Navigate to the Application Decision Details window to enter for each interface table application record in a given group the decision details such as dates of decision, offer, and offer response, decision reason, and decision maker.

Alternatively, use the Default Decision Details window to enter these details once for all applications offered.

Prerequisites

A group of completed applications exists in the interface table identified by a batch ID.

Application outcome statuses, decision reasons, and individuals authorized to make decisions are defined.

APCs, offer response offset days for an APC, admission periods, date aliases, and absolute values for the offer response date aliases for admission periods are defined. If required, admission period date overrides for offer response for an APC, program, or program offering can be defined.

Navigation

Admission > Admission Decision Details

Steps

1. Query the appropriate group of interface table application records in the Admission Decision Details window and click **Default Details**.
2. Enter date of decision, person number of decision maker, and reason for decision in the Default Decision Details window.
3. Click **Done** to save your work, close the Default Decision Details window, and return to the Admission Decision Details window.

On saving the date of offer and date for offer response are derived.

4. Alternatively, query the group in the Admission Decision Details window. Select an application from the group and click **Application Decision Details** to enter decision details for the application in the Application Decision Details window.
5. Click **Done** to save your work, close the Application Decision Details window, and return to the Admission Decision Details window.

On saving the date of offer and date for offer response are derived.

6. Repeat step 4 and 5 for the other applications in the group.

3.8.4.5 Discarding and Overriding Decisions

Navigate to the Application Outcome window to override a decision for a single application. Use the Admission Decision Details window and the Discard Decisions button to override the decisions of multiple applications in a given group of applications in the interface table.

Examples of when decision makers can override an original outcome are given below:

- If the original outcome was a conditional offer and the applicant either met or failed to meet the conditions given.
- If the application was originally rejected, reconsidered and given an offer.
- If an applicant withdraws an application after an offer is made.
- If an application is to be voided or withdrawn and is held with an outcome of **Suspended** until after the close of the admission period.

Prerequisites

Application outcomes are entered.

The Override Admission Outcome Status and Allow Outcome Status To Be Changed APC steps are included for the Application Outcome step group.

Navigation

To override the outcome of a single application

Admission > Direct Admission

To discard a set of application decisions or outcomes

Admission > Admission Decision Details

Steps

1. Query an applicant in the Direct Admission window, select an application and click **Open Application**.
2. Click **Outcomes** in the Applications window and navigate to the Override Outcome tab to change or override the outcome.
3. Enter reasons for the change in decision.

You can override the outcome statuses of **Conditional Offer** and **Lapsed to Accepted**. If an outcome is being changed or updated from **Conditional Offer** to **Offer**, Oracle Student System checks if the country code is set to UK. If Oracle Student System confirms that this is a UCAS application instance, it automatically updates the offer response to **Accepted** eliminating the need to import the offer response or manually update it.

4. Alternatively, query a group of applications in the interface table in the Admission Decision Details window, select the applications for which decisions need to be overridden and click **Discard Decisions**.

This deletes the decisions for the selected applications of the group in the interface tables.

5. You can then enter new application outcomes in the Admission Decision Details window, enter new decision details, save these in the interface tables and post them afresh to Oracle Student System tables. For more information, refer to [Posting Admission Decisions](#) and [Entering Decision Details for Multiple Applications](#).

Updating outcomes in Oracle Student System tables raises the oracle.apps.igs.pe.rescal.io business event and triggers the IGSADOUD/P_OUTCOME_STATUS_CHANGE workflow alerting administrators about the change in the outcome status.

3.8.4.6 Notifying Applicants of Outcome

Once a decision is entered, administrators notify applicants of the decision and for an offer or conditional offer, inform them of the date by which they must respond to the offer or meet the conditions given to enable an offer.

Prerequisites

Application outcomes are recorded.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

> Admissions:Admissions Letter

> Admissions:Conditional Offer Letter

> Admissions:Admit to Future Term Letter

> Admissions:Waitlist Letter

> Admissions:No-Quota Letter

> Admissions:Rejection Letter

Steps

1. If an offer of admission is made, run the Admissions:Admissions Letter concurrent process to inform applicant of admission offer and date by which applicant must confirm acceptance of offer.

Optionally, if the offer accompanies certain conditions that the applicant must fulfill, run the Admissions:Conditional Offer Letter concurrent process to inform applicant of the offer, and the conditions and date by which applicants must fulfill conditions for admission to be offered.

If the applicant has not been taken for the current term but for the future term, run the Admissions:Admit to Future Term Letter concurrent process. This letter informs applicants of the admission and academic calendar of the future term in which they have been offered admission and the date by which they must respond to the offer.

If the educational institution is keen on admitting an applicant, but has no seat open for placement, run the Admissions:Wait List Letter concurrent process. The letter informs applicants that they have been waitlisted for admission pending last-minute drop-outs on seats that were taken. It also updates applicants on their waitlist rank and status.

2. If an applicant belongs to a special category for which the educational institution provides admissions but the quota is full, run the Admissions:No-Quota Letter concurrent process. The letter informs applicants that all seats in the quota are taken eliminating possible admission.
3. If the applicant does not qualify for admission, run the Admissions:Rejection Letter concurrent process. This informs applicants that the institution regrets that they did not qualify for admission.

For details on selecting the applicants to inform, the channels of information, and resending information, refer to [Acknowledging the Receipt of Applications](#). For parameter details and sample report output of the concurrent processes, see [Correspondence](#).

3.8.4.7 Viewing Correspondence History

Use the Correspondence Interaction History window to check the correspondence requested for an applicant and its state of processing.

You can use this window to resend a bunch of letters to the applicant, if required.

Prerequisites

Document types and statuses are defined and mapped to system letter codes.

Navigation

Correspondence > Correspondence Interaction History

Steps

1. Query the applicant for whom you wish to view all the correspondence that the educational institution has had.

You can sort correspondence by document name, type, or status, or requested or sent date.
2. Select the required documents and select the Resend check box against each of them. Click **Resend** to generate the letters, resend them, and remind the applicant or recipient.
3. Click on the Interaction Details tab to view further details on the correspondence such as the relevant application instance, program, and award year.
4. Close the window.

3.8.4.8 Requesting Reconsideration of Applications

Use the Application Offer Response window to enter applicant requests for reconsideration of rejected applications.

Prerequisites

An application instance is denied admission or rejected.

The Request Reconsideration APC step is included for the Application Outcome step group.

Navigation

Admission > Direct Admission > Open Application > Offer Response

Steps

1. Select the Request For Reconsideration check box in the Offer Response tab of the Application Offer Response window.
2. Save your work.

For information on processing requests for reconsideration of applications, refer to [Reconsidering Applications](#).

3.9 Closing Admissions

Educational institutions must close admission applications received in an admission period. Decision makers make an offer and await a response to the offer before taking action to close an application.

The closing of admissions involves the following:

- [Confirming Enrollment and Pre-enrolling Students](#)
- [Reconsidering Applications](#)
- [Creating New Applications for Deferred and Future Terms](#)

An application may have several instances. The application processing status of an admission application will be updated to **Complete** and the application closed for the following conditions.

- An admission application is rejected.
- An admission offer is accepted.

- An admission offer is deferred, the deferment is approved, and a deferred application is created.

This can happen if an applicant cannot enroll in the current session and defers the offer to a later period. If the program applied for is available in a future session or term, decision makers can approve the deferment, specify the future term, create a fresh application for it, and close the initial application.

- An admission offer is given for a future term, the offer is accepted, and a future term application is created.
- An admission offer is declined by the applicant.

3.9.1 Confirming Enrollment and Pre-enrolling Students

When an offer or conditional offer is made, the deadline for offer response is derived or entered. Refer to [Entering an Application Outcome](#). The applicant must respond within the deadline for an offer or the application lapses and is considered closed if no other instance is active. For a conditional offer, the applicant must satisfy the conditions within the offer response deadline.

When an applicant responds to an offer, administrators manually enter this offer response or import them for a group of applicants. If the Single Response check box is selected for an APC in the Admission Period Calendars window, only the first offer response for the APC and term per applicant is taken.

If the Perform Pre-enrollment on Offer APC step is included, pre-enrollment occurs when an offer is made. Otherwise, pre-enrollment occurs only when an applicant accepts an offer. Pre-enrollment on offer creates an unconfirmed student program attempt in Enrollments. Pre-enrollment on offer acceptance creates an inactive student program attempt enrollment record.

For UCAS applications, if a conditional offer is later offered, Oracle Student System automatically updates the offer response status to **Accepted** and pre-enrolls the applicants.

For deferred applications, applicants can pay enrollment deposit for a confirmed deferment. A deferred application once confirmed for admission to a future term can no longer be updated.

Administrators can view application and application instance history for an applicant, admission calendar and program offering option to check for application completion before declaring admissions closed.

Confirming enrollment and pre-enrolling students involves:

- Entering an Applicant's Offer Response
- Importing Applicants' Responses to Offers
- Identifying Errors in Importing Responses
- Receiving Enrollment Deposits
- Reminding Applicants to Respond to Offers
- Closing Lapsed Applications
- Deleting Unconfirmed Pre-enrollment
- Completing Post Admission APC Tracking Items
- Completing Applications
- Identifying Incomplete Post Admission Requirements
- Notifying Applicants to Complete Post-Admission Requirements
- Sending Letters on Pending Post-Admission Requirements
- Checking Applications for Closure

3.9.1.1 Entering an Applicant's Offer Response

Use the Application Offer Response window to enter the offer response of an applicant for an application instance.

Prerequisites

Offer response and offer deferment statuses are defined.

Navigation

Admission > Direct Admission

Steps

1. Query an applicant in the Direct Admission window, select the application, and click **Open Application**.
2. In the Applications window, click **Offer Response** and enter the applicant's response to the offer of admission in the Offer Response tab of the Application Offer Response window.

If the applicant declines the offer, enter the name of the educational institution that also offered admission and which the applicant chose to attend instead.

3. Enter if required, additional comments on the response.
4. Save your work.

When there is a change in the offer response status of an application instance, the Application Offer Response Status Change business event (oracle.apps.igs.ad.offerresponse.changed) is raised. This in turn triggers the following workflow notifications:

- Admission Enforce Single Response Notification or SNGLRESP/P_OFFER_SINGLE_RESPONSE if the offer is accepted by the applicant and the APC that the application instance is associated with has the single offer response checked
- Admission Offer Response Status Change or ADOFRESP/P_OFFER_RESPONSE_CHANGE to notify administrators for further action that they must take

These notifications enable the Financial Aid office to start their processing as soon as an applicant accepts the offer. Refer to [Importing Applicants' Responses to Offers](#).

3.9.1.2 Importing Applicants' Responses to Offers

Run the Import Offer Response concurrent process to import in bulk the responses of applicants from third party sources. You can run this concurrent process before or after the deadline given for responding to an offer has passed.

For example, these can be responses of UK applicants that are routed through the Universities and Colleges Admissions Services (UCAS). Responses must first be populated into interface tables and identified by a batch number before they can be imported into Oracle Student System tables.

For more information, see the Offer Response Import Process in the *Oracle Student System Open Interfaces User's Guide*.

Prerequisites

Applicants are offered admission.

Offer response and offer deferment statuses are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Import Offer Response concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Import Offer Response concurrent process parameters.

Table 3–19 Import Offer Response Parameters

Parameter	Description
Batch ID	You must select the interface table batch ID for the offer response records to be imported.
Deadline Past. Import?	Select Yes to import offer responses after the deadline for responding to the offer has passed. Select No if the process must only import offer responses before the deadline.

For information on the business events raised and the workflows triggered, refer to [Entering an Applicant's Offer Response](#).

3.9.1.3 Identifying Errors in Importing Responses

Run the Import Offer Response Error Report concurrent process to report on any errors in importing a group of offer responses from the interface tables.

The report enables you to make corrections in the interface table before running the Import Offer Response concurrent process again to re-import the corrected records.

Prerequisites

The Import Offer Response concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Import Offer Response Error Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. Select the interface table batch ID to run the concurrent process.

3.9.1.4 Receiving Enrollment Deposits

Use the Application Fees window to enter enrollment deposit received from an applicant who has accepted the admission offer. For more information, refer to [Recording the Receipt of Fees and Deposits](#).

3.9.1.5 Reminding Applicants to Respond to Offers

Run the Admissions: Admit No Response Letter concurrent process to remind applicants who have been offered admission and have failed to respond to the offer.

You can run this concurrent process after the offer response deadline has passed. After this reminder, if there is still no response, the offer and application is considered lapsed.

For more details on admission letters, refer to [Acknowledging the Receipt of Applications](#). For information on parameters and report output sample, see [Admissions - Admit No Response System Letter Concurrent Process](#) in Correspondence.

Prerequisites

Applicants are offered admission.

The Admissions:Admissions Letter concurrent process is run to notify applicants of the offer and the deadline by which they must respond.

The offer response deadline has passed with no response from applicants on the offers.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

3.9.1.6 Closing Lapsed Applications

Run the Lapsed Admission Offers concurrent process for applications that have been offered admission or given a conditional offer where the offer response date has passed without any response to the offer or on the conditions given.

This concurrent process updates the application processing status to **Complete** and the offer response status from **Pending** to **Lapsed**. You can view the updated offer response status in the Application Offer Response window.

The **Lapsed** offer response status can only be entered by this concurrent process.

This concurrent process has no parameters.

Prerequisites

The outcome status of an application is Offer or Conditional Offer.

The conditional offer status and the offer response status is Pending after the offer response deadline has passed.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

3.9.1.7 Deleting Unconfirmed Pre-enrollment

Run the Clean Up Unconfirmed Student Program Attempts Report concurrent process to delete the unconfirmed student program attempt enrollment records created by pre-enrolling admission offers. The concurrent process considers lapsed applications that have been pre-enrolled on offer.

If contract and sponsorship details are established for an application and a predictive fee assessment run with fee assessment effective dates that are greater than the program commencement date, the Clean Up Unconfirmed Student Program Attempts Report concurrent process:

- Reverses the fee assessment and inserts the transaction amounts to reduce the balance in the Direct Assignment of Sponsorships window
- End dates the contract by inserting the start date of the contract taken from the Contract Fee Assessment Rates and the Establish Fee Contracts windows
- End dates sponsorship with the sponsorship start date taken from the Direct Assignment of Sponsorships window
- Retains the student program attempt
- Reports student details and produces a message that the unconfirmed student program attempt was not deleted

If a contract is established, but a predictive fee assessment is not run, the concurrent process:

- Deletes the contract and the student program attempt
- Reports the student details and produces a message that the unconfirmed student program attempt was successfully deleted

Other program attempt data, such as advanced standing not approved, that the concurrent process cannot delete are reported.

The Clean Up Unconfirmed Student Program Attempts Report concurrent process is scheduled to run nightly by an admissions officer and depends on the enrollment clean-up date alias. This concurrent process produces a report that displays depending on the parameters selected, either all the records that were successfully processed or only the exceptions. If the enrollment clean-up date alias, typically near the end of the admission period, does not match the current date, a blank report is produced.

For information on setting up the enrollment clean-up date alias, see *Oracle Student System Implementation and Administration Guide*.

Prerequisites

The APC step of Perform Pre-enrollment On Offer is included for the Application Outcome step group.

The Lapsed Admission Offers concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Clean Up Unconfirmed Student Program Attempts Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, refer to the following table.

The following table describes the Clean Up Unconfirmed Student Program Attempts Report concurrent process parameters.

Table 3–20 Clean Up Unconfirmed Student Program Attempts Report Parameters

Parameter	Description
Runtime Comment	Enter free format text to appear as comment in the report header.
Log Creation Date (Required only for a Prior Job Run)	Select the run date if this concurrent process was run earlier.

Table 3–20 (Cont.) Clean Up Unconfirmed Student Program Attempts Report

Parameter	Description
Report Level	Select the level of reporting. If you do not enter a value, the report displays all messages including exceptions.

3.9.1.8 Completing Post Admission APC Tracking Items

Run the Admission Tracking Item Completion concurrent process for applications with an offer of admission where the offer has been accepted. This concurrent process checks and updates the tracking status of each post-admission tracking item for an APC to **Complete**.

For information on navigation and parameters, refer to [Completing APC Tracking Items](#).

3.9.1.9 Completing Applications

Run the Admission Application Completion concurrent process to update the application completion status to **Complete**. This concurrent process is run for applications with an offer of admission where the offer has been accepted.

Note: You must have run the Admission Tracking Item Completion concurrent process and all the application tracking items must be complete.

For navigation and parameters, refer to [Updating Application Status](#).

3.9.1.10 Identifying Incomplete Post Admission Requirements

Run the Admissions Completeness Check Report concurrent process to produce a list of post-admission missing items.

For information on how to enter parameters, refer to [Identifying Missing or Incomplete Tracking Items](#).

3.9.1.11 Notifying Applicants to Complete Post-Admission Requirements

Run the Admission Requirements Notification concurrent process to send notifications to applicants who have accepted admission offers and have pending requirements that must be satisfied for enrollment. Select the tracking type of **Post Admission**.

You can send notifications in a given academic calendar:

- To applicants in a person ID group

- To applicants with applications by their APC, program or program offering option
- To a single applicant

In the Admission Application Status self-service pages, applicants and administrators can view post admission tracking steps for an application instance in the Post Admission Requirement Details region.

For information on navigation and parameters, refer to [Notifying Applicants of Pending Requirements](#).

Additional Notes

The Admissions Completeness Check Report concurrent process has been run and has identified missing items for applications.

Running the Admission Requirements Notification concurrent process with the tracking type parameter set to post admission raises the oracle.apps.igs.ad.appl.post_adm_req business event.

This triggers the ADPADMRQ/P_PST_ADMRQ workflow process which notifies applicants that they have pending post admission requirements. See Workflow in *Oracle Student System Implementation and Administration Guide* for information about this business event. For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

3.9.1.12 Sending Letters on Pending Post-Admission Requirements

Run the Admissions:Post Admission Missing Items Letter concurrent process to inform applicants of pending requirements that need to be met before the applicants can enroll.

For more details on admission letters, refer to [Acknowledging the Receipt of Applications](#). For information on parameters and report output sample, see [Admissions - Post Admission Missing Items Letter Concurrent Process](#) in Correspondence.

Prerequisites

The Admissions Completeness Check Report concurrent process is run and missing items for various applications are identified.

Thereafter, the Admission Requirements Notification concurrent process is run to notify applicants of the missing items.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

3.9.1.13 Checking Applications for Closure

Use the Admission Application History window to check if applications are complete. For an incomplete application, navigate to the Admission Program Application Instance History window to check on the completion statuses of each of the instances of the application.

You can search applications by applicant, APC, or program offering option.

Prerequisites

Applications are processed.

Application outcome and completion statuses are defined.

Navigation

To view statuses of applications and fees of a single applicant

Requests > Admissions History > Admission Application

To view statuses of application instances in the application of a single applicant

Requests > Admissions History > Program Application

Steps

1. Query by applicant, APC or admission calendar to view the statuses of all the applications and respective fees in the Admission Application History window.
2. Close the window.
3. Query an applicant or program offering option to view the detailed history of application instances of an application in the Admission Program Application Instance History window. Details range from completion period through outcome to offer and deferment information.
4. Close the window

3.9.2 Reconsidering Applications

Reconsidered applications can include rejected or no-quota applications that applicants request be reconsidered or applications with offers that applicants have

deferred acceptance of in a future term. For information on reconsidering applications, refer to [Requesting Reconsideration of Applications](#).

Applications may be rejected because they did not qualify for admission. Late quota applications may be denied admission if all reserved seats are taken. The educational institution may decide not to reconsider rejected applications.

For deferred applications, reconsideration involves approving the deferment. For rejected and no quota applications, reconsideration involves revisiting decision inputs and reviewing the admission decision. If the outcome after reconsideration stays rejected, the application is considered closed.

Reconsidering applications involves:

- [Cancelling Requests for Reconsideration](#)
- [Initializing Reconsideration of Rejected Applications](#)
- [Reviewing Applications and Reconsidering Outcomes](#)
- [Approving Deferments](#)
- [Rejecting Reconsidered Applications](#)
- [Withdrawing Rejected Applications](#)

3.9.2.1 Cancelling Requests for Reconsideration

For rejected and no-quota applications that the educational institution does not wish to reconsider for either the current or future term, run the Admissions Cancel Reconsideration Request concurrent process.

You can run this process for:

- All the applications marked for reconsideration in a person ID group.
- All marked applications in a session (academic calendar and APC).
- All applications in a person ID group and session.

This process un-checks the Request for Reconsideration flag and updates the application processing status to **Complete**.

Prerequisites

Rejected and no-quota applications are flagged for reconsideration.

Offer outcome statuses are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admissions Cancel Reconsideration Request concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Admissions Cancel Reconsideration Request concurrent process parameters.

Table 3–21 Admissions Cancel Reconsideration Request Parameters

Parameter	Description
Person ID Group	Select reconsidered applications of applicants in this person ID group.
Calendar Details	Select reconsidered applications in this academic and admission calendar.
Admission Process Category	Select reconsidered applications with this admission process category (APC).

You can also run this concurrent process as a request set. To do this, set the value of the initialize admission period date alias, which is near the beginning of the admission period, to match the current date and schedule to run this nightly by an Admissions Officer.

The request set is made up of two concurrent processes as given below:

- Admissions Cancel Reconsideration Request
- Initialize Admissions Reconsiderations Job

The first concurrent process releases the reconsideration option flagged on applications that the educational institution does not wish to reconsider and ensures that the second concurrent process does not revert the outcome statuses to **Pending** or moves them to the next admission period where the program is being offered.

Prerequisites

Rejected and no-quota applications are flagged for reconsideration.

Offer outcome statuses are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

3.9.2.2 Initializing Reconsideration of Rejected Applications

Run the Initialize Admissions Reconsiderations Job concurrent process to change the outcome of all rejected applications back to Pending, deselect the Request for Reconsideration check box, and update the admission period to the next one which offers the same program.

To run this concurrent process as part of a request set, refer to [Cancelling Requests for Reconsideration](#). For information on setting up the initialize admission period date alias, see Calendar Date Aliases for Admission System Processes in the Admissions chapter of the *Oracle Student System Implementation and Administration Guide*.

This concurrent process has no parameters.

Prerequisites

Rejected and no-quota applications are flagged for reconsideration.

Offer outcome statuses are defined.

3.9.2.3 Reviewing Applications and Reconsidering Outcomes

For information on reviewing applications and reconsidering outcomes, refer to [Reviewing Decision Inputs](#), [Offering Final Unit Sets](#), [Offering Units](#), and [Recording Decisions](#).

3.9.2.4 Approving Deferments

For applications that have been deferred to a later date by applicants, use the Deferment tab of the Application Offer Response window to approve the deferment and enter the future term that the application is deferred to. The future term must offer the same program.

Prerequisites

An application instance is offered admission which the applicant has deferred to a future term.

Members of staff are authorized to check for availability of the program applied for in future terms and approve the deferment.

The program applied for is available in a future term.

Navigation

Admission > Direct Admission

Steps

1. Query an applicant in the Direct Admission window, select an application and click **Open Application**.
2. In the Applications window, click **Offer Response**.
3. In the Deferment tab of the Application Offer Response window, enter the future admission and academic calendar to which the application is deferred and update the deferment status to **Approved**.

The Deferment tab is enabled only if the application offer response status is **Deferral**. You can not update an application with an offer response of **Deferred** and deferment status of **Confirmed**. For information on confirming a deferred offer response, refer to [Updating Offer Deferment and Response Statuses](#).

4. Save your work.

3.9.2.5 Rejecting Reconsidered Applications

If a reconsidered application is rejected once again, deselect the Reconsideration check box in the Admission Decision Details window. This will close the applications for processing again. For information on changing outcomes, refer to [Discarding and Overriding Decisions](#).

3.9.2.6 Withdrawing Rejected Applications

For suspended applications, run the Process Suspended Admission Applications concurrent process on or after the program start date for the current admission period to update the outcome status of **Suspended** to **Withdrawn**.

Prerequisites

Rejected applications have been reconsidered and rejected again.

Outcome statuses are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Process Suspended Admission Applications concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Process Suspended Admission Applications concurrent process parameters.

Table 3–22 *Process Suspended Admission Applications Parameters*

Parameter	Description
Academic Period	Select the academic period for which suspended applications are to be processed.
Admission Period	Select the admission period in the given academic period for which suspended applications are to be processed.
Admission Process Category	Select to restrict the processing of suspended applications by their admission process category.

3.9.3 Creating New Applications for Deferred and Future Terms

A new application is created when an applicant defers the offer to a future period and the institution approves this deferment. After the new application is created, the administrator must change the deferment status from **Approved** to **Confirmed** to enable the applicant to pay the enrollment deposit. Once a deferment is confirmed, the application can no longer be updated. If the institution rejects the deferment, the application is closed.

A new application is also created when the institution returns an outcome of *Future Term*. This may happen if the student is not fully qualified or if the class is full but the institution would like the student to come later. Oracle Student System creates a new application and sets the outcome status to **Offer**.

Creating new deferred and future term applications involves:

- [Identifying Approved Deferments](#)
- [Creating Deferred Applications](#)

- [Creating Future-Term Applications](#)
- [Notifying Applicants of Future-Term Offer](#)
- [Updating Offer Deferment and Response Statuses](#)

3.9.3.1 Identifying Approved Deferments

Run the Students with Approved Deferment Report concurrent process to produce a report on:

- The number of students with approved deferment
- The availability of places for subsequent admissions
- Deferment trends in organizational units
- The load for deferred students in the next admission period

You can run the report for deferred applications by

- Admission process category (admission process type and category) in an academic and admission calendar
- Program in an academic and admission calendar
- Program offering option
- Organizational unit
- Program and organizational unit
- Academic and admission calendar

You can sort the report by admission process type, admission category, and organizational unit.

The Students with Approved Deferment Report concurrent process is run by an admissions officer as needed or is scheduled to run at regular intervals during and at the end of admission periods. This concurrent process can be run in batch mode or online, particularly with a small data set.

Prerequisites

Applicants have deferred their offer and these deferments are approved.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Students with Approved Deferment concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the Students with Approved Deferment concurrent process parameters.

Table 3–23 Students with Approved Deferment Parameters

Parameter	Description
Runtime Comment	Enter free format text to appear as comment in the report header.
Admission Process Type	Select to limit the process to applications with this admission process type.
Admission Category	Select to limit the process to consider applications with this admission category. Select a combination of process type and admission category to limit the process to applications with a particular APC.
Program Organizational Unit	Select to limit the process to applications by the organizational unit responsible for the program.
Program	Select to limit the process to applications by their program.
Program Type Group	Select to limit the process to applications by the program type group.
Location	Select to limit the process to applications by the campus or study center where the institution conducts its classes. Select a combination of location, attendance type and mode to limit the process to applications with a specific program offering option.
Attendance Mode	Select to limit the process to applications by the method in which the student undertakes the program. Select a combination of location, attendance type and mode to limit the process to applications with a specific program offering option.

Table 3–23 (Cont.) Students with Approved Deferment Parameters

Parameter	Description
Attendance Type	Select to limit the process to applications by the work load of the student if full-time or part-time. Select a combination of location, attendance type and mode to limit the process to applications with a specific program offering option.
Start Period	Select an active academic and admission calendar the applications of which the process must consider.

3.9.3.2 Creating Deferred Applications

Run the Create Deferment Applications concurrent process to create new applications for approved deferments in the admission period specified.

Prerequisites

The Students with Approved Deferment Report concurrent process is run to identify the approved deferments.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Create Deferment Applications concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Create Deferment Applications concurrent process.

Table 3–24 Create Deferment Applications Parameters

Parameter	Description
Person Number	Select to run the process for a single applicant.
Person ID Group	Or select to run the process for all the applicants in this person ID group.
Program	Select to limit the run to applications by their program.

Table 3–24 (Cont.) Create Deferment Applications Parameters

Parameter	Description
Current Academic/ Admission Period	Select to run the process for deferred applications received in this academic and admission period.
Deferred Academic/ Admission Period	Select to create new applications in this academic and admission period.
Offer Date	You must enter a new offer date for the new applications created in the deferred academic and admission period.
Override Offer Response Date	Enter the new offer response date to override the original offer response date given. This date must be greater than the offer date or Oracle Student System derives a date from the offer response offset date given in the Admission Process Category Detail window.

3.9.3.3 Creating Future-Term Applications

Run the Create Future Term Application concurrent process to create new applications for applications with an outcome of *Future Term*. The new applications are created in the specified future term academic and admission period with outcome statuses of **Offer** and new dates for offer response.

For more information on application outcomes, refer to [Entering an Application Outcome](#).

You can run the process:

- To create future term application instances of a single applicant
- To create future term application instances for all applicants in a person ID group
- To create future term application instances for all application instances with a common program
- To create future term application instances for application instances that were received in a given academic and admission period.

Prerequisites

Applications are offered for a future term.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Create Future Term Application concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Create Future Term Application concurrent process parameters.

Table 3–25 Create Future Term Application Parameters

Parameter	Description
Person Number	Select to run the process for a single applicant.
Person ID Group	Or select to run the process for all the applicants in this person ID group.
Program	Select to run the process for applications by their program.
Current Academic/ Admission Period	Select to run the process for future term applications received in this academic and admission period.
Future Academic/ Admission Period	Select the future academic and admission period in which the process must create new applications.
Offer Date	You must enter a new offer date for the new applications that the process will create.
Offer Response Date	Enter a new date by which the applicants must respond to the offer made. This date must be greater than the offer date or Oracle Student System derives the date from the offer response offset date given in the Admission Process Category Detail window.

3.9.3.4 Notifying Applicants of Future-Term Offer

Once future term applications are created, run the Admissions: Future Term Second Admission Letter concurrent process to inform applicants of the future term offer.

For more information on admission letters, refer to [Acknowledging the Receipt of Applications](#).

For information on parameters and report output sample, see [Admissions - Future Term Second Admission Letter Concurrent Process](#) in Correspondence.

Prerequisites

The Create Future Term Application concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

3.9.3.5 Updating Offer Deferment and Response Statuses

Once new applications are created for deferred applications, use the Application Offer Response window to confirm the deferment and accept the offer. This enables enrollment payment.

Prerequisites

The Create Deferment Applications concurrent process is run.

Navigation

Admission > Direct Admission > Open Application > Offer Response

Steps

1. Query the applicant in the Direct Admission window, select the old application and click **Open Application**.
2. In the Applications window click **Offer Response**.
3. In the Deferment tab of the Application Offer Response window change the offer deferment status from **Approved** to **Confirmed**.
4. Save your work.

Click the history icon next to offer deferment status to view history of changes in offer deferment status.
5. In the Offer Response tab, change the offer response status from **Pending** to **Accepted** to enable enrollment payment.
6. Save your work.

3.10 Granting Advanced Standing

The applicant may request for advanced standing based on units studied, work experience, or scores in admission tests. Administrators consider this request only when an admission offer is made and the applicant has been pre-enrolled creating an unconfirmed student program attempt in Enrollments.

Advanced standing status is said to be approved when requested. Administrators can subsequently grant credit points as advanced standing at unit level or for individual units that the applicant will study. These are awarded to the applicant by term.

Alternatively, advanced standing can mean that applicants opt to take alternate units in lieu of studying prescribed units for the program. This is known as preclusion. For more information on advanced standing concepts and functionality, see [Academic Records](#).

Granting advanced standing involves:

- [Identifying the Program Attempt](#)
- [Entering Unit Level Advanced Standing](#)
- [Entering Unit Advanced Standing](#)

Advanced standing is granted for units to be studied. To grant advanced standing, administrators consider units previously studied, and test scores of test segments and types for admission placement tests such as SAT and ACT that the applicant has taken. Units to be studied can be considered for advanced standing either individually or as units at a unit level in the course such as first, second, or third year of study.

A unit level defines the units and credit points that the students in a program must take. For example, first year students of BA Psychology at unit level 1 must take English 101 and History 402 for a total of 20 credit points. In the second year at unit level 2, they must take Math 203 and Biology 603 for another 20 credit points. At unit level 1, administrators may have granted student X with an undergraduate degree in History all 20 credit points as advanced standing, and granted student Y, an immigrant with a bachelor's degree in History, only 5 credit points as advanced standing.

To grant advanced standing for individual units to be studied, these units must be articulated. A unit is said to be articulated when its contents can be mapped to the contents of a unit previously studied at a different educational institution. As qualifications are non-standard in US educational institutions and qualification subjects cannot be considered when articulating units, administrators can only

grant advanced standing to UK applicants at the unit level. For information on transcripts and qualifications, refer to [Maintaining Transcripts and Qualifications](#).

Only staff members are authorized to grant or after granting revoke or cancel granted advanced standing. The maximum limit for possible advanced standing credit points for a program are defined in the Program Structure and Planning subsystem. Advanced standing must be granted before the date of expiration to be considered for progression.

3.10.1 Identifying the Program Attempt

Use the Advanced Standing Details window to select the program in which the applicant has been pre-enrolled on offer of admission.

If credit points have been requested or approved and subsequently granted, you can use this window to view the total credit points granted and the percentage contribution of these towards program completion requirements.

You can also use this window to navigate to related windows to approve or enter the applicant's request for advanced standing and to grant this.

Prerequisites

A transcript record from an institution exists or previous institution details captured for qualifications have been received.

An application for a program exists for which the applicant is offered admission.

The pre-enrollment on offer APC step is included having created an inactive program attempt record in Enrollments.

Default basis exemption institution is defined.

Program completion requirements is defined.

Navigation

Admission > Direct Admission > More > Academic History > Advanced Standing Details

Additional Notes

- Select the program for which the applicant has applied, been offered admission and been pre-enrolled creating an inactive program attempt in Enrollments.
- If a transcript record exists, the institution name is taken from it. If a transcript record does not yet exist, the institution name is taken from the one given as

default in the Advanced Standing Configuration window. This will be the current institution where the applicant is pre-enrolled and the institution that will grant advanced standing or exemption of units and credit points. If you know the institution from which the transcript is expected, you can edit the default exemption institution and enter instead the previous institution.

3.10.2 Entering Unit Level Advanced Standing

Advanced standing can be granted by term at unit level for units previously studied or against admission placement test scores.

Use the Advanced Standing Unit Level Details window to enter advanced standing credit points at unit level. Administrators consider units that applicants have previously studied. These are units that feature in a transcript. If the applicant is from the United Kingdom or from a commonwealth country, these units are subjects that the applicant qualified in.

Credit points are awarded towards the credit points requirements in the first, second, third year or unit level 1, 2, 3 of the course that the applicant will study.

Prerequisites

Transcript or qualification records, previous institution details, admission placement test scores, and applications with an outcome of offer exists.

Advanced standing statuses are defined.

Program types, program groups, terms, unit levels, and expiration date increment months are defined.

Maximum advanced standing limit for programs is defined.

Navigation

Admission > Direct Admission > More > Academic History > Advanced Standing Details

For applicants from the United Kingdom:

Admission > Direct Admission > More > Academic History > Advanced Standing Details > Qualification Details > Unit Level Details

Steps

1. To grant advanced standing for admission placement tests taken, click **Exam Articulation Details**. This brings up the admission placement test details

captured. For information on creating an admission test record, refer to [Maintaining Admission Test Details](#).

2. To grant advanced standing for units previously studied, click **Unit Articulation Details**. This brings up the unit details of the transcript record. For information on creating a transcript record, refer to [Entering Transcripts](#).
3. To grant advanced standing for qualifications achieved in various subjects, click **Qualification Details**. This brings up the qualification details entered. For information on creating a qualification record, refer to [Entering Qualification Details](#).
4. In the Unit Level Details tab of the Advanced Standing Unit Level Details window, select the term to which the advanced standing granted is to be applied when considering student progression.
5. Select the year in the course or unit level for which advanced standing is being granted.
6. Enter the credit points for the unit level and term.
7. In the Other Details tab, approval and grant date are taken from the system date of the day on which the advanced standing was first approved and then granted.

The date of expiry is derived from the date of approval which is incremented by the months specified in the Advanced Standing Configuration window.

8. Enter the person number of the staff member authorizing the approval and then the granting of advanced standing. Optionally enter comments, if required.
9. Select the career level or program type.

Select the Program Group check box when granting advanced standing to a student transferring from one program in a program group to another new program in the same group. Also, select the Completed check box if the student has completed the program that he or she is transferring from. If the student is returning to complete studies after a break, enter the last year of enrollment.

10. Save your work.

You must first approve the advanced standing credit points before granting them to the applicant.

11. Click **Back** to return to the Advanced Standing Articulation Details window.

3.10.3 Entering Unit Advanced Standing

Advanced standing is granted by term for articulated units in the course that the applicant will study against units previously studied or against admission placement test scores.

Use the Advanced Standing Unit Details window to grant the applicant either a choice of alternate units for the unit precluded from or credit points for each of the units that the applicant will study.

You must first approve and then grant advanced standing for individual, articulated units in the course. In the case of applicants from the United Kingdom advanced standing cannot be granted for units that they will study as units cannot be articulated against qualification records.

Prerequisites

The prerequisites in [Entering Unit Level Advanced Standing](#) all apply here with the exception of qualification records.

Advanced standing types, and grading schemas and grades are defined.

Navigation

Admission > Direct Admission > More > Academic History > Advanced Standing Details

Steps

1. To grant advanced standing for admission placement tests taken, click **Exam Articulation Details**. This brings up the admission placement test details captured. For information on creating an admission test record, refer to [Maintaining Admission Test Details](#).
2. To grant advanced standing for units previously studied, click **Unit Articulation Details**. This brings up the unit details of the transcript record. For information on creating a transcript record, refer to [Entering Transcripts](#).
3. In the Unit Details tab of the Advanced Standing Unit Details window, select the term and the articulated unit to which the advanced standing granted is to be applied.
4. Select also the advanced standing type and status. If the advanced standing type selected is **Credit**, optionally enter the credit points to be given to the applicant as advanced standing.

If you choose to preclude units for advanced standing, Oracle Student System displays a null value for credit points and enables the Alternate Units tab.

5. In the Grade Details tab, enter the grading schema used in the previous institution and the grades achieved for the unit.
6. In the Other Details tab, view approval, grant, and expiration dates. Enter program and authorization details. For details, refer to steps 7-9 of [Entering Unit Level Advanced Standing](#).
7. If the Advanced Standing Type you chose is Preclusion, in the Alternate Units tab, select the alternate units that the applicant can take in lieu of the unit that is part of program. The credit points associated with the unit is automatically displayed.

Select the Optional check box if the applicant has a choice in studying the particular alternate unit.

8. Save your work.

You must first approve the advanced standing credit points or alternate units before granting them to the applicant.

9. Click **Back** to return to the Advanced Standing Articulation Details window.

3.11 Maintaining Fee Details

If required by the educational institution, applicants are required to pay application fees for each application they submit. The fee amount varies per application type and APC and is mapped to a revenue and cash account. If the institution has Oracle Financials installed these will be General Ledger accounts. You can set a default fee amount for an application type and APC. In applicant self-service, full payment of fees can be made. In administrator self-service, partial or full payment of fees can be made. However, if iPayment process is being used, only full payment can be made in the administrator self-service. Partial or full payment of fees can be made in the back office.

Students are usually required to pay an enrollment deposit to confirm their intention to enroll in an educational institution. An enrollment deposit is transferred as a credit to the student account after the applicant successfully enrolls in a program.

- If the enrollment deposit level is set to **All** in the Application Types window, then deposits will be transferred irrespective of the program applied to during admission.

- If the enrollment deposit level is set to **Program Type**, the deposit is accepted for enrollment in any program within the same program type. Examples of program types include Bachelor's or Master's degrees.
- If the enrollment deposit level is set to **Application Only**, the deposit will be transferred to the program specified in the application.
- If the enrollment deposit level is set to **Program**, the deposit will be transferred to the program specified in the Admission Application Types setup. For information on setting-up Application Types, see *Oracle Student System Implementation and Administration Guide*.

You can set a default deposit amount for an application type and APC.

There are other fees that the institution may require the applicant to pay that are recorded in Admissions such as deposits for housing, registration fees for campaign events, and even enrollment charges.

The administrator can establish a fee contract with an applicant for discounted rates. This is possible only if the required APC step is set and pre-enrollment has occurred creating a student program attempt. The administrator can then run a predictive fee assessment for the program.

Maintaining fees involves:

- [Defining Accounts and Amounts by Application Type](#)
- [Recording the Receipt of Fees and Deposits](#)
- [Predicting Fees and Establishing Contracts](#)

3.11.1 Defining Accounts and Amounts by Application Type

Use the Application Types window and the Admission Enrollment Deposit Level Details window to define the amount that an applicant must pay as application fee and enrollment deposit for an application type and APC. Application fees must be mapped to revenue accounts if applicants pay by check and to cash accounts for cash payments that are received.

For more information, see *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Application types are defined and mapped to APCs.

Revenue and cash accounts are defined.

Navigation

Admission > Admission Setup > Setup Application > Application Types

Steps

1. Query for an application type or application type and APC in the Application Types window.

2. In the Application Fees tab enter the fee amount and the revenue and cash accounts to which the checks and cash will be credited.

If Oracle Financials is installed enter appropriate General Ledger revenue and cash accounts.

3. In the Enrollment Deposit tab, enter the deposit amount for the application type and APC. Select the level at which to set the deposit.

If set to program or program type level, click **Admission Enrollment Deposit Level Details** to enter in the relevant tab the programs and program versions or the program types.

Select the System Default check box to make the application type the default for the APC. Select the Closed check box to prevent further use of the application type for the APC. Select the Use in Applicant Self Service check box to enable applicants to make payments in self-service.

4. Save your work.

3.11.2 Recording the Receipt of Fees and Deposits

For every application submitted, the applicant can pay the appropriate application fees. The amount charged depends on the application type and APC of the application. For information on attaching an application type and APC, refer to [Selecting the Term and Processing Method](#).

If an applicant has accepted an offer of admission and pre-enrollment has occurred, you can accept the enrollment deposit and other miscellaneous fees such as those for housing, library, and other facilities.

Use the Application Fees window to record payments received during the admission period. Payments can be partial or full payments.

Enrollment deposit payments can be recorded only if applicants accept an admission offer, or have a new application with an offer of admission in the deferred future term for a previous offer that the applicant deferred. Application

fees can only be accepted after an application is submitted and before the application has completed processing.

Prerequisites

Application fee amount for an application type and APC is defined and mapped to revenue and cash accounts.

Deposit amounts and levels for an application type and APC are defined.

Fee types and admission fee statuses are defined and mapped to system-defined types and statuses.

Navigation

Admission > Direct Admission

Steps

1. Query an applicant in the Direct Admission window, select the application for which the payment is to be recorded and click **Open Application**.
2. In the Applications window, click **Application Fees**.
3. In the Application Fees window, select the fee type, enter the amount received, the date on which received, and the fee status if paid, outstanding, waived, not applicable, or not yet assessed.

If your institution does not use Student Finance and the Manage Accounts System Options is set to **Others** or **Null**, you can record a partial or full enrollment deposit payment in self-service and in the Application Fees window. For more information, see Student Finance in *Oracle Student System Implementation and Administration Guide*.

4. Save your work.
5. Click **Update Tracking** to update the Tracking subsystem with the appropriate payment details.

You can only track payments that map to full or waived system fee statuses. To track the payment of application fees and enrollment deposits, create tracking steps for them. Map these to the system tracking steps of Administrative and Enrollment Deposit, and further to the system tracking types of **Admission Processing** and **Post Admission**. Include these tracking steps in the tracking item created and assigned to an applicant.

For payments by credit card using self-service, Oracle Student System generates a reference number and updates the Application Fees window to aid tracking. If the applicant is not using student finance and the Manage Accounts System Options is set to Others or Null, the applicant cannot pay the application fees in self-service. However, administrators can still record a full or partial payment in Admissions forms.

For information on creating tracking items for applicants, refer to [Assigning Requirements to a Group of Applications](#).

6. If necessary for reference, click **Admission Enrollment Deposit Level Details** to view the enrollment deposit amount in the Enrollment Deposit tab of the Application Types window and the programs or program types that the enrollment deposit is mapped to.
7. Save your work.

Additional Notes

System admission fee statuses are:

- Admission Fees Assessed - Payment Outstanding
- Application Exempt From Admission Fees
- Admission Fees Not Applicable
- Admission Fees Yet To Be Assessed
- Admission Fees Assessed - Payment Received

3.11.3 Predicting Fees and Establishing Contracts

Educational institutions may entertain special discounted fee rates for specific programs for a fee type of a particular fee category. Fee categories are mapped to APCs.

Applicants in such a fee category may wish to know the difference that a contract would make in the amount of fees that they would be expected to pay for the entire program.

You can include the Create a Fee Contract During Pre-enrollment APC step for the Application Outcome step group to automatically create a fee contract in Enrollments that you can view in the Establish Fee Contracts window and accept.

Predictive fee assessment can only be done for a program and is used only in the United Kingdom. Setting the fee calculation method to Program is a one time setup done in the System Options window in Student Finance.

Prerequisites

The Create Fee Contract And Perform Fee Assessment APC step is included for the Program Data - Button step group and the Perform Pre-enrollment On Offer APC step is included for the Application Outcome step group.

Applicants have accepted offers of admission and the pre-enrollment process has created student program attempt enrollment records.

The fee calculation method is set to Program and charge rates are defined for the fee category, type, calendar and program.

Contract charge rates and period are defined for an applicant and application instance.

Navigation

Admission > Direct Admission

Steps

1. Query the applicant in the Direct Admission window. Select the application for which the applicant has accepted the offer and click **Open Application**.
2. In the Applications window, click **More** and click **Fee Detail**.
3. If contract charge rates have been defined in the Contract Fee Assessment Rates window in Student Finance for the applicant and application instance, view these details in the Establish Fee Contracts window.

A fee category and calendar may have more than one fee type each with its own charge rate and contract charge rate.

4. If there is more than one fee type and contract charge rate, select the most suitable and click **Set Contract**.
5. Click **Fee Assessment** to do a predictive assessment of fees at the contract charge rate selected and set.

3.12 Generating non-US Admission Statistics

The government of a country may define targets for the number of students of a type that an educational institution must enroll in a year. An example is the reporting required by the Australian government. These defined targets are known as Submission Student Intake targets.

Intake targets can be set for an organizational unit, funding source, program type, attendance mode and program level or directly for a program and funding source.

Once defined for an institution, the institution can then report admission statistics to the government according to the guidelines outlined by the government.

Generating admission statistics involves:

- [Generating Statistics on Academic Results](#)
- [Generating Statistics on Offered Applications](#)

3.12.1 Generating Statistics on Academic Results

Run the Admissions Academic Result Requisition concurrent process to provide the government with requested academic results for non-US institutions.

The Admissions Academic Result Requisition concurrent process is run by an Admissions Officer after the government agency submits an electronic request for academic results.

This concurrent process produces both the Academic Results Requisition report and an extract file in accordance with government agency specifications.

Prerequisites

Student target types and submission intake targets are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admissions Academic Result Requisition concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. Enter the input file name.

3.12.2 Generating Statistics on Offered Applications

Run the Admissions Government Enrollment Statistics Return File concurrent process to produce the government enrollments statistics return.

The concurrent process is run only in batch mode and produces an error log file of the details from the government request file records that did not reconcile with Oracle Student System records.

Prerequisites

The government offer round file is provided.

Application processing is complete and admission decisions have been made.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Admissions Government Enrollment Statistics Return File concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Admissions Government Enrollment Statistics Return File concurrent process parameters.

Table 3–26 Admissions Government Enrollment Statistics Return File Parameters

Parameter	Description
Academic Calendar	You must select the academic calendar that the process will consider applications and student program attempts in.
Input Filename	You must enter the name of the file to be produced.

Enrollment

The Enrollment subsystem manages all enrollment-related activities for students. This includes pre-enrolling students, enrolling new students, re-enrolling returning students, and managing changes that occur after enrollment.

This chapter details the following topics:

- [What's New in this Release](#)
- [Enrollment Overview](#)
- [Concepts](#)
- [Pre-enrolling Students](#)
- [Enrolling Students](#)

4.1 What's New in this Release

In this release, Oracle Student System has the following new and modified features:

- [Uploading Unit Attempts](#)
- [Enrolling Waitlisted Students](#)
- [Enrolling Placement Units](#)
- [Receiving Notifications](#)
- [Managing Term Records](#)
- [Managing Core Units](#)

4.1.1 Uploading Unit Attempts

The Bulk Unit Attempt Upload concurrent process is new for this release. You can now easily upload several unit attempts into Oracle Student System using an interface table.

4.1.2 Enrolling Waitlisted Students

There are several improvements to the Waitlist functionality in Enrollment. You can now set up rules for adding students to a waitlist based on specified priorities and preferences. Most of the modifications are at an implementation level. This user guide details any modifications to the enrollment process, caused by changes in setting up waitlists.

For more information, see *Oracle Student System Implementation and Administration Guide*.

4.1.3 Enrolling Placement Units

This release supports the ability to enroll students into placement units, as defined in the Program Structure and Planning subsystem.

This new functionality modifies the existing pre-enrollment, enrollment, and legacy import processes.

4.1.4 Receiving Notifications

This release includes notifications and workflows that indicate important events and statuses to administrators during enrollment. These notifications are also part of integration with the Financial Aid subsystem.

The notifications are triggered for the following events:

- Students dropping a unit
- Change in key program

4.1.5 Managing Term Records

The concept of maintaining term records is new to this release and aims to capture and store enrollment information on a term basis.

Term records are created or updated for the following situations:

- Creation of unit attempts

- Change in program offering option
- Change in primary or key programs
- Program transfers
- Class Standing Overrides

Term records affect most areas of Enrollment functionality.

4.1.6 Managing Core Units

For easy identification, all core units are now set off with a *core* indicator in self-service.

During setup, you can specify whether a student or administrator can drop core units from self-service. For more information, see *Oracle Student System Implementation and Administration Guide*.

On searching for units, the Results section in self-service indicates core units and unit sections specific to a pattern of study. Core unit attempts are also identified in the My Schedule page.

4.2 Enrollment Overview

The enrollment process usually begins in Admissions for the following student categories:

- New students seeking admission to programs
- Returning students seeking readmission

Although enrolling students through Admissions is preferred, you can also directly enroll students through Enrollment. However, this method is not recommended as enrollment through Admissions offers greater levels of control.

Enrollment creates and maintains student enrollment records including program, unit, and unit set attempts. Broadly, the subsystem can be organized into the following:

- [Program Attempts](#)
- [Unit Attempts](#)
- [Unit Set Attempts](#)
- [Enrollment Variations](#)

Enrollment is also closely integrated with other subsystems in Oracle Student System. For example, student enrollment categories can be assigned in Admissions and fees are calculated in Student Finance based on the program, unit, and fee category details derived from Enrollment.

Program Attempts

Program attempts are created either through the *admissions process* or through *direct enrollment*.

In the admissions process, an unconfirmed student program attempt is created when an offer is extended to a student. Based on setup, the program attempt may be confirmed when students return an offer response accepting the admission offer.

Both the admissions process and direct enrollment use *pre-enrollment* to create or confirm the student program attempt.

Pre-enrollment copies student personal and program details from Admissions to Enrollment creating student enrollment records. Pre-enrollment differs for new students being admitted to a program for the first time, and students returning to an existing student program attempt. These differences are discussed in detail in the pre-enrollment section.

Unit Attempts

Once a student program attempt is created for a student, you can pre-enroll or enroll unit attempts against the program attempt.

Pre-enrolled unit attempts are created through pre-enrollment or through the Bulk Unit Attempt Upload or Bulk Unit Enrollment concurrent processes. Pre-enrollment tries to create unit attempts for new or returning students, based on a hierarchy. It first checks to see if the admission application has an associated unit section, then checks to see if the concurrent process parameters include unit sections, and then checks the pattern of study. Pre-enrollment then uses the first of these sources, where it finds units specified. Once a source is found, pre-enrollment does not continue to the others.

If pre-enrolled unit attempts already exist, they can be confirmed in self-service. Students and administrators can use self-service to enroll unit attempts against the program.

Based on setup, validations based on the person, program, or unit being enrolled can be enforced. For more information, see Oracle Student System Implementation and Administration Guide.

Unit Set Attempts

A unit set can be used to define a path of study within the program and to indicate a concentration, such as a major, minor, or stream.

Enrollment Variations

After enrollment, the status of a student's program, unit, and unit set attempts may change.

Enrollment changes include the following:

- Lapsed program attempts: Educational institutions lapse a program attempt if the student does not enroll to units within the specified time.
- Discontinuation: Students withdraw from a program attempt before it is completed.
- Intermission: Students are temporarily suspended from a confirmed program attempt.
- Change in Program Offering Option: Students change program attempt detail, such as program location or attendance mode.
- Transfer: Students take a transfer to another program, unit, or unit set.
- Addition of unit attempts: Students can add unit attempts to a program attempt.
- Drop of unit attempts: Students can drop unit attempts from a program attempt.
- Changes in unit details, such as grading schema, credit points, subtitles.
- Changes in unit set attempt details, such as completion or ending details.

4.3 Concepts

The behavior of the Enrollment subsystem depends in part, on whether the educational institution uses the *career or program-centric modes*. The following table illustrates the major difference between the two modes.

Table 4–1 Career centric and Program centric Modes

Model	Career	Program Attempt
Career centric	UG	BA Sociology: Primary Program
Career centric	UG	BA History: Secondary Program

Table 4–1 (Cont.) Career centric and Program centric Modes

Model	Career	Program Attempt
Program centric	None	BA Sociology
Program centric	None	BA History

In the career-centric mode, groups of programs are defined as belonging to the same career. Examples of careers include Undergraduate, Graduate, and Doctorate. Individual program attempts are grouped in a career. In the example shown in the table, the program attempts for BA Sociology and BA History are grouped under the career, Undergraduate. In a career, a single program is designated as the *primary program* (Refer table) and unit attempts can be added only to a primary program. The primary program is the program used for all progression purposes. All programs in a career, other than the primary program, become *secondary programs*.

The career-centric mode allows students to pursue more than one career and have multiple attempts for each career. For example, a student may enroll in a Graduate career by enrolling in an MBA program at the same time as finishing a Bachelors degree program in Literature as part of an Undergraduate career.

In the career-centric mode, a student must define a primary program for each career and a single key program. The characteristics of the primary program influence some enrollment validations. For each student, only one program can be key at a point in time. The key program is used to determine the attendance type and by the Student Finance subsystem for assessing fees. Whenever a student’s key program changes, a business event is raised that notifies administrators.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For more information on creating workflows for business events, see *Oracle Workflow User’s Guide*.

In the program-centric mode, each program remains an individual program attempt, and the attributes of each program attempt are considered individually for the enrollment process. Unit attempts, for example, can be added to any program attempt.

The primary program functionality is not used when the educational institution operates in a program-centric mode.

For more information, see *Oracle Student System Implementation and Administration Guide*.

The behavior of the Enrollment subsystem also depends on whether the *Year of Program* functionality is enabled in Oracle Student System. A program of study in

the United Kingdom is structured into a number of years. Each year is referred to as a year of program. Year of program functionality in Enrollment allows pre-enrolling students to core and/or optional unit sections based on their year of study and advancing a student's year based on progression results.

Each year of program is represented by a unit set that is mapped to the system profile option, **Pre-enrollment Year**. This unit set will be specified as the *year unit set*. Unit sets, representing streams or concentrations, can be mapped to the *year unit sets*.

A student is pre-enrolled in the year of program for a student program attempt. If the pattern of study is defined for the *year unit set* and/or any unit sets mapped to the *year unit set*, pre-enrollment can create core and/or optional unconfirmed unit attempts based on the pattern of study. The pre-enrolled unit attempts are confirmed by the Batch Registration Update concurrent process or in self-service.

Once the student is assessed for the enrolled unit attempts, the institution can run progression against the student. Based on the applied progression outcome, the student can either advance to the next year of program, repeat the same year of program, or can have an outcome that indicates whether the student needs to resit before progression is re-evaluated. The pre-enrollment concurrent process recognizes the progression outcomes and can advance or repeat the student's year of program unit set attempt and related unit attempts.

For more information, see *Oracle Student System for the United Kingdom User Guide*.

4.4 Pre-enrolling Students

4.4.1 Overview

Pre-enrollment differs for new and returning students. For new students, pre-enrollment is performed when the admission offer is made and can be performed when the student accepts the offer.

Pre-enrollment creates the enrollment category record, which is used to process enrollment and enrollment variations. This record can be accessed using the Administrative Details button in the Student Program Attempt window.

Pre-enrollment can be divided into the following headings:

- [Pre-enrolling Individual Applications Automatically through Admissions](#)
- [Pre-enrolling Individual Applications Automatically through Enrollment](#)
- [Pre-enrolling Multiple Applications](#)

- [Pre-enrolling Multiple Applications through Enrollment](#)
- [Pre-enrolling Returning Students](#)
- [Pre-enrollment Constraints](#)
- [Running Batch Pre-enrollment Process](#)
- [Viewing List of Pre-enrolled Students](#)

4.4.2 Pre-enrolling Individual Applications Automatically through Admissions

Pre-enrollment can be configured as an Admission Process Category (APC) step to be performed when the application outcome status changes to **Offer** or **Conditional Offer**. The process always runs on an offer response. Pre-enrollment through Admissions can be divided into the following tasks:

- [Managing Student Program Attempts](#)
- [Determining Enrollment Periods and Enrollment Categories](#)
- [Creating Student Unit Set Attempts](#)
- [Creating Student Unit Attempts](#)
- [Linking Candidacy Records to Student Program Attempts](#)
- [Establishing Enrollment Due Dates](#)

4.4.2.1 Managing Student Program Attempts

Pre-enrollment through Admissions varies based on whether or not student program attempts exist in Enrollment. If a student program attempt does not exist in Enrollment, pre-enrollment creates one based on the admission offer and performs the following steps:

- Assigns the default fee category either from the category specified in the admission application or the default mapping of the admission category with the fee category.
- Sets the program attempt status to **Unconfirmed**, if pre-enrollment is performed when making the admission offer. This is because the student program attempt is not yet confirmed by the student.
- Sets or changes the program attempt status to **Inactive**, if pre-enrollment is performed when an offer of admission is accepted. This is because the student program attempt is not yet enrolled.

If a student program attempt already exists in Enrollment, for example due to readmission, pre-enrollment performs the following steps on the program attempt:

- Changes the status **Deleted** to **Unconfirmed** and sets the location code, attendance mode, attendance type, and fee category according to the new offer.
- Changes the status **Discontinued** to **Inactive** if the offer has not been accepted. Then, sets the location code, attendance mode, attendance type, and fee category according to the new offer.
- Changes the status **Lapsed** to **Inactive** if the offer has not been accepted or to **Enrolled** if the form due date has not yet passed. Then, sets the location code, attendance mode, attendance type, and fee category according to the new offer.
- For **Inactive** or **Unconfirmed** statuses, sets the location code, attendance mode, attendance type, and fee category according to the new offer.
- Takes no action on program attempts with the status, **Completed**, **Enrolled**, or **Intermit**.

4.4.2.2 Determining Enrollment Periods and Enrollment Categories

For each program attempt, whether newly created or already existing, pre-enrollment attempts to register a student program attempt in an enrollment period, with a specified enrollment category, in order to create a student program attempt enrollment record.

The *enrollment period* is determined from the relationship between the admission calendar instance in which the offer is made and the enrollment calendar instance. If this relationship has not been set up, the application is not pre-enrolled. For more information, see *Oracle Student System Implementation and Administration Guide*.

The *enrollment category* is determined either from the category specified in the admission application or the default mapping between the admission category and enrollment category. If an enrollment category cannot be determined, the application is not pre-enrolled.

Pre-enrollment updates the enrollment category if a student program attempt enrollment record already exists, with the same enrollment period as determined but a different enrollment category.

The enrollment period and enrollment category are copied into the Student Program Attempt Administration Details window.

4.4.2.3 Creating Student Unit Set Attempts

Pre-enrollment attempts to copy unit set details recorded in the admission application to the student program attempt and creates unit set attempts based on the following:

- A new, unconfirmed student unit set attempt is created, if none exists
- A new student unit set attempt is created, if one exists for the program attempt with an end date that has already passed
- No unit set attempt is created, if a current one exists for the program attempt

4.4.2.4 Creating Student Unit Attempts

Student unit attempts are created under the following conditions:

- If there is a unit offering option associated with the application, pre-enrollment copies it to Enrollment as an unconfirmed student unit attempt. If the pre-enrollment concurrent process is run with unit sections as parameters, it creates unconfirmed unit attempts.
- If a pattern of study exists for a program, pre-enrollment uses this to create unconfirmed student unit attempts. For a pattern of study, pre-enrollment can be performed for both target and future academic periods, depending on the number of periods specified to be pre-enrolled. For more information on pattern of study, see *Oracle Student System Implementation and Administration Guide*.
- Educational institutions can use the pattern of study to indicate core and optional units. Unit attempts can be pre-enrolled based on whether they are defined as **Core** or **Optional** in the pattern of study. You can specify pre-enrollment to occur for either core units or for core and optional units by selecting the Pre-enroll in Pattern of Study Core and Optional step in the admission process category. For more information on pattern of study, see *Oracle Student System Implementation and Administration Guide*.
- For unit sections that have defined superior and subordinate units, the superior units are pre-enrolled first. When a superior unit section is pre-enrolled, the subordinate unit sections with the Default Enroll check box selected are also automatically pre-enrolled. This setting is specified in the Unit Section Relationships window, while working in the back-office application. For more information, see *Oracle Student System Implementation and Administration Guide*.

If this setting is not specified, the superior unit section is independently pre-enrolled.

Pre-enrolled unit attempts are confirmed using one of the following:

Self-service: Pre-enrolled unit attempts appear in the enrollment cart when users log on. When unit attempts are confirmed, Oracle Student System validates them against the combination of the enrollment category, enrollment method, and the student type setup for self-service enrollment.

Registration update process: The registration update process allows you to enter information about the student, the academic year, and the date the student appeared for registration. All unit attempts for the academic year are confirmed by this process, and the date for receipt of the enrollment form is updated to the date entered. This functionality is used primarily in the United Kingdom but is available for use in the United States as well. For more information, see *Oracle Student System Open Interfaces User Guide*.

4.4.2.5 Linking Candidacy Records to Student Program Attempts

If a research candidature record has been created as part of an admission application, the candidature record is linked to the student program attempt. When the offer is accepted, the proposed start date recorded as part of the candidature record is mapped to the start date of the student program attempt.

4.4.2.6 Establishing Enrollment Due Dates

By default, pre-enrollment establishes an enrollment due date for the student program attempt. The due date defaults to the due date for enrollment specified in the Enrollment Calendar Configuration window. You can override this date by directly inserting a value in the Enrollment Form Due Date field in the Program Attempt Administration window. You can also override the due date by re-running Batch Pre-enrollment Process as a precursor to generating enrollment forms and specifying a date in the Override Form Due Date field.

For more information on configuring calendars, see *Oracle Student System Implementation and Administration Guide*.

For more information on Batch Pre-enrollment Process, refer to [Running Batch Pre-enrollment Process](#).

4.4.3 Pre-enrolling Individual Applications Automatically through Enrollment

Automatic individual pre-enrollment is performed through the Student Program Attempt window when you try to confirm an unconfirmed program attempt.

Oracle Student System first checks for the existence of a corresponding admissions offer in the relevant admission period. Pre-enrollment is performed only if the admissions offer exists.

For more information on pre-enrollment, refer to [Pre-enrolling Individual Applications Automatically through Admissions](#).

4.4.4 Pre-enrolling Multiple Applications

Pre-enrollment for multiple applications can be performed using the Batch Pre-Enrollment concurrent process. It can be set up to run as a nightly standing request or can be run at other times and for subsets of admissions applications.

This process is scheduled to run nightly. It can, however, be set to run at other times, and for groups of qualifying admission applications. For example, a pattern of study for a program might get approved after some students have been pre-enrolled in the program. In such a situation, the process can be run again exclusively for the program, so as to apply the pattern of study to both the pre-enrolled students and any other new applicants for the program. The student program attempts affected by the concurrent process are determined by the parameters that you select.

For each applicant or student record selected during the concurrent process, pre-enrollment is performed as described in [Pre-enrolling Individual Applications Automatically through Admissions](#).

To run the relevant process, refer to [Running Batch Pre-enrollment Process](#).

4.4.5 Pre-enrolling Multiple Applications through Enrollment

Student program attempts can be entered directly in Enrollment. For this, select the Person Add Allowed and the Program Add Allowed check boxes for an enrollment category, specified during setup. Selecting these options allows you to create unconfirmed student program attempts directly in Enrollment, which can be pre-enrolled by the Batch Pre-enrollment Process concurrent process.

However, when student program attempts are directly entered in Enrollment, the students are treated as returning students.

On running the concurrent process, pre-enrollment takes place when the following conditions are met:

- The attributes of the student program attempt match the parameters specified for the concurrent process.

- The student program attempt has the status, **Unconfirm**.
- The student is not deceased or encumbered for the entire academic year.

For more information on pre-enrolling returning students, refer to [Pre-enrolling Returning Students](#).

For more information on running the Batch Pre-enrollment Process concurrent process, refer to [Running Batch Pre-enrollment Process](#).

4.4.6 Pre-enrolling Returning Students

A *returning student* is one who has passed the Start Cutoff Date Alias of their first enrollment in a program. For more information on date aliases, see *Oracle Student System Implementation and Administration Guide*.

For returning students, the pre-enrollment process is designed to create an *eligible to enroll* record. Pre-enrollment changes to see that the enrolled program version is offered and issues a warning if necessary.

In some circumstances, pre-enrollment creates unconfirmed student unit attempts. The process also updates the enrollment category record for the specified enrollment period.

Pre-enrollment takes place when the following conditions are met:

- The process detects that the attributes of the student program attempt match the specified parameters.
- The student program attempt has a status of **Inactive** or **Intermit**. If the status is **Intermit**, the intermission should be due to expire in the upcoming academic period.
- The student is not deceased or encumbered for the entire academic year.

For each student program attempt, pre-enrollment performs the following steps:

- Determines the enrollment category from the previous pre-enrollment period. If no previous pre-enrollment record is found, the enrollment category must be specified as a parameter to the concurrent process.
- Creates a student program attempt enrollment record using the enrollment period specified as a parameter for the concurrent process and the enrollment category determined from the previous step. If a record already exists for the enrollment period, the enrollment category is updated if it is different from the enrollment category determined.

- Checks if the student's enrolled program version is still being offered within the target academic period. If not, a warning is generated but pre-enrollment is still performed.
- Checks whether the Pre-enroll pattern of study units parameter is set in the concurrent process. If yes, unit attempts can be pre-enrolled through a pattern of study. Pre-enrollment can be performed for both target and future academic periods, depending on the number of periods specified in the pattern of study.

To run the relevant process, refer to [Running Batch Pre-enrollment Process](#).

4.4.7 Pre-enrollment Constraints

During pre-enrollment, the following constraints apply:

- [Unit Constraints](#)
- [Pattern of Study Constraints](#)
- [Pre-enrollment Unit Offering Option](#)

4.4.7.1 Unit Constraints

Units for pre-enrollment can only come from one of the following sources:

- The admission application
- Parameters in the pre-enrollment concurrent process
- A pattern of study attached to the program

Oracle Student System checks, in the order given, for the existence of data and uses the first units found. For example, if units are specified in the admission application, no other units will be considered.

If there are unit attempts already recorded against the student program attempt, the following occur:

- Units specified in Admissions that do not exist are added
- Units specified in the concurrent process that do not exist are added
- Units from a pattern of study are not added

A unit will not be pre-enrolled if:

- The student is currently excluded from the unit.

- The student has been granted advanced standing of type Credit at 100% or Preclusion. For more information on advanced standing, see [Advanced Standing](#) in Academic Records.

4.4.7.2 Pattern of Study Constraints

If no unit attempts exist, subsequent runs of Batch Pre-enrollment Process can be used to apply a pattern of study to the record.

For example, a student is made an offer through Admissions in program Art (A300) for the coming academic year, and pre-enrollment is performed online. However, there are no units specified in the admission application, and the pattern of study for this program is not yet approved. In such a situation, no unit attempts are pre-enrolled.

On the other hand, the pre-enrollment concurrent process is set to run once a week. This process has its Pre-Enroll Units parameter set to **Yes**, and the combination of its other parameters means that it will process program A300.

A few weeks later the pattern of study for A300 is approved for the coming academic year. When the concurrent process runs next, the student is selected because the student program attempt has an approved pattern of study and there are no pre-enrolled units. The units are pre-enrolled according to the pattern of study.

Pattern of study pre-enrollment is not performed when:

- A student has granted or approved unit level advanced standing in the program attempt.
- A student has a current unit requirement hold that is not met by the pattern of study for the program.
- A returning student has failed to complete the prescribed pattern of study. This is determined by checking for passed and incomplete unit attempts in teaching periods specified in the pattern. This check is overridden if the Always Pre-enroll check box is selected for a pattern of study.
- The pattern of study is not approved for the target academic calendar instance. If no approved calendar instance is recorded for the pattern of study, no approval is required.

4.4.7.3 Pre-enrollment Unit Offering Option

In the pattern of study, only the unit code needs to be identified, not necessarily the unit location or unit class. When a unit section is not specified, pre-enrollment uses the following method to determine the unit section:

Pre-enrollment searches for all available offerings of the unit within the relevant period which match the pattern of study teaching calendar type. Multiple records may be returned if the unit is offered in various location and class combinations. Further,

- If the location code has been specified in the pattern of study, only offerings at that location are considered.
- If the location code has not been specified, only offerings at the student's program attempt location are considered.
- If the unit class has been specified, only offerings in that class are considered.
- If the unit class has not been specified, offerings of any available mode are considered. If the mode of an offering matches the mode of the student program attempt, the offering is preferred over others.

This selection process typically reduces the available unit offerings to one. If more than one remains, one is selected at random. This occurs when the unit is offered in multiple classes within a mode, such as day and evening classes for the on-campus mode.

4.4.8 Running Batch Pre-enrollment Process

Run the Batch Pre-Enrollment Process concurrent process to pre-enroll new or returning students.

For nightly processing, only the target period might be selected to run the concurrent process. In this case, the concurrent process only considers applicants and students if they meet one of the following criteria:

- No student program attempt exists for their application.
- If a student program attempt exists, the associated program offering has a pattern of study, but no unit pre-enrollment has occurred in the target academic period.

This concurrent process is also run in immediate mode for groups of qualifying admission applications, when small groups of admission offers, including an

enrollment form, are being made. Immediate mode pre-enrollment is also used to pre-enroll approved pattern of study units.

Prerequisites

Student program attempt exists when run, to create unconfirmed unit attempts.

Enrollment categories and enrollment methods are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Batch Pre-enrollment Process concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. In the respective fields, enter the academic period, term calendar, and enrollment method for which students are to be pre-enrolled.
3. Use the following criteria to filter student records:
 - Progression outcome
 - Person ID group
 - Program type
 - Program code
 - Program offering option
 - Responsible organization unit
 - Pattern of study
4. Override enrollment categories set as default, the due date by which enrollment is to be completed, and package production dates, if necessary.
5. Enter the units and unit classes of a unit set that the process must pre-enroll students in. You can set the process to pre-enroll in units and unit classes of more than one unit set.
6. Run the Batch Pre-Enrollment concurrent process again, if a pattern of study for the program being pre-enrolled is defined only after creating student program attempts.

7. To set the parameters, refer to the following table.

The following table describes the Batch Pre-enrollment Process concurrent process parameters.

Table 4–2 Batch Pre-enrollment Process Parameters

Parameter	Description
Report Level	Select level of detail required in exception report.
Sort Order	Select the order in which exception report is to be sorted.
Academic Period	Select academic period in which students are to be pre-enrolled. This is a mandatory parameter.
Term Calendar	Select term in the academic period in which students are to be pre-enrolled. This is a mandatory parameter.
Student Type	Enables pre-enrollment of new and returning students. If New is selected, enter parameters for new students. If Return is selected, enter parameters for returning students. Set pre-enrollment for new students by admission category or period and for returning students by enrollment category and period.
Program Type	Select the program type.
Responsible Organization Unit	Select the organizational unit responsible for program delivery.
Person ID Group	Select the person ID group for which students are to be pre-enrolled.
Program Code	Select the program for which students are to be pre-enrolled. You can either enter a single code or for multiple codes, enter a partial code with a % symbol and search for the appropriate code.
Location Code	Select the location code from the admission application or the student program attempt. If entered with the program code, attendance type, and mode students will be pre-enrolled based on the program offering option.
Attendance Mode	Select the attendance mode. If entered with the program code, attendance type, and location students will be pre-enrolled based on the program offering option.

Table 4–2 (Cont.) Batch Pre-enrollment Process Parameters

Parameter	Description
Attendance Type	Select the attendance type. If entered with the program code, attendance mode, and location students will be pre-enrolled based on the program offering option.
Default Enrollment Category	Select an enrollment category, if no category is set up as default.
Enrollment Method	Select an enrollment method, if no method is set up as default. This is a mandatory parameter.
Pre-Enroll Advance or Repeat Students	Select an appropriate progression outcome.
Pre-enroll pattern of study units	Select option to pre-enroll pattern of study units. Defaults to Core Only .
Override Form Due Date	Enter a value to override the form due date.
Override Package Production Date	Enter a value to override the package production date.
Returning Students Enrollment Period	Select target enrollment period to which returning students are to be pre-enrolled.
Returning Student Last Enrollment Category	Select the previous enrollment category of returning students. This restricts pre-enrollment to students with the specific enrollment category.
New Students Admission Category	Select admission category of students being pre-enrolled. This defines the group of students being pre-enrolled.
New Students Admission Period	Select admission period of students being pre-enrolled. This restricts pre-enrollment to students from this admission period.
Default Program Confirmed	Select No to select Confirm check boxes in pre-enrolled student program attempts. Select Yes to deselect Confirm check boxes in pre-enrolled student program attempts.
Minimum Program Attempt Start Day	Select the day of the month on which the program is to commence.
Maximum Program Attempt Start Day	Select the day of the month on which the program is to end.
Minimum Program Attempt Start Month	Select the month in which the program is to commence.

Table 4–2 (Cont.) Batch Pre-enrollment Process Parameters

Parameter	Description
Maximum Program Attempt Start Month	Select the month in which the program is to end.
Select Students in Unit Set Code 1	Select a unit set to which students are to be pre-enrolled.
Select Students in Unit Set Code 2	Select an additional unit set to which students are also to be pre-enrolled.
Unit Set Selection Date	Enter the start date of the period for which the unit set selection criteria specified is valid.
Unit Set Completion Date	Enter the end date of the period for which the unit set selection criteria specified is valid.
Unit Code 1	Enter a partial value to select the unit code to which students are to be pre-enrolled.
Calendar Type 1	Select the teaching calendar of the unit to which students are to be pre-enrolled. This parameter is enabled only if you enter the unit.
Location Code 1	Select the location for the unit to which students are to be pre-enrolled. This parameter is enabled only if you enter the teaching calendar.
Unit Class 1	Select the class for the unit in which students are to be pre-enrolled.

The following table describes configurations for the Batch Pre-enrollment Process concurrent process in the following three categories:

- Running Batch Pre-enrollment Process as a scheduled request for new students through Admissions
- Running Batch Pre-enrollment Process in the immediate mode for new students through Admissions
- Running Batch Pre-enrollment Process for new student program attempts through Admissions

Table 4–3 Batch Pre-enrollment Process Parameters Configurations

Parameter	Batch Pre-enrollment of New Students through Admissions as a Scheduled Request	Batch Pre-enrollment of New Students through Admissions in Immediate Mode	Batch Pre-enrollment of New Student Program Attempts through Admissions
Report Level	Any option can be selected If All Errors And Warnings is selected, the report can be very long because an entry appears for all student program attempts considered, including those successfully pre-enrolled.	Any option can be selected If All Errors And Warnings is selected, the report can be very long because an entry appears for all student program attempts considered, including those successfully pre-enrolled.	Any option can be selected If All Errors And Warnings is selected, the report can be very long because an entry appears for all student program attempts considered, including those successfully pre-enrolled.
Sort Order	Person ID or Surname	Person ID or Surname	Person ID or Surname
Log Creation Date	Must be left blank This parameter is useful when rerunning an exception report with a greater level of detail.	Must be left blank This parameter is useful when rerunning an exception report with a greater level of detail.	Must be left blank This parameter is useful when rerunning an exception report with a greater level of detail.
Academic Period	Academic period in which students are enrolled	Academic period in which students are enrolled	Academic period in which students are enrolled
Student Type	New	New	Returning
Program Type	Optional	Entered as required to refine a set of student program attempts to be processed	Optional

Table 4–3 (Cont.) Batch Pre-enrollment Process Parameters Configurations

Parameter	Batch Pre-enrollment of New Students through Admissions as a Scheduled Request	Batch Pre-enrollment of New Students through Admissions in Immediate Mode	Batch Pre-enrollment of New Student Program Attempts through Admissions
Responsible Organization Unit	Optional	Entered as required to refine a set of student program attempts to be processed	Optional
Person ID Group	Must be left blank	If applicable, enter person ID group containing students to be processed	Must be left blank
Program Code	Optional	Entered as required to refine a set of student program attempts to be processed	Optional
Location Code	Optional	Entered as required to refine a set of student program attempts to be processed	Optional
Attendance Mode	Optional	Entered as required to refine a set of student program attempts to be processed	Optional
Attendance Type	Optional	Entered as required to refine a set of student program attempts to be processed	Optional

Table 4–3 (Cont.) Batch Pre-enrollment Process Parameters Configurations

Parameter	Batch Pre-enrollment of New Students through Admissions as a Scheduled Request	Batch Pre-enrollment of New Students through Admissions in Immediate Mode	Batch Pre-enrollment of New Student Program Attempts through Admissions
Default Enrollment Category	Must be left blank and Pre-enrollment exception report must be reviewed for errors or Specify default value to prevent pre-enrollment from failing for a student program attempt in which enrollment category cannot be determined	Must be left blank and pre-enrollment exception report must be reviewed for errors or Specify default value to prevent pre-enrollment from failing for a student program attempt in which enrollment category cannot be determined	Enrollment category must be specified
Pre-enroll pattern of study units	Select No if patterns of study are not finalized for target academic period. or Select No if creation of enrollment form is not part of admission process. At the time of creating enrollment forms, pre-enrollment can be run with Yes selected. or Select Yes if patterns of study are finalized and enrollment forms are to be created.	Can be used to apply patterns of study to specific student groups. Set to Yes if patterns of study finalized	Select No if patterns of study are not finalized for target academic period. or Select Yes if patterns of study are finalized and enrollment forms are to be created.

Table 4–3 (Cont.) Batch Pre-enrollment Process Parameters Configurations

Parameter	Batch Pre-enrollment of New Students through Admissions as a Scheduled Request	Batch Pre-enrollment of New Students through Admissions in Immediate Mode	Batch Pre-enrollment of New Student Program Attempts through Admissions
Override Form Due Date	Must be left blank	Must be left blank	Must be left blank
Override Package Production Date	Must be left blank	Must be left blank	Must be left blank
Returning Students Enrollment Period	Used for returning students only	Used for returning students only	Default values must be selected
Returning Students Last Enrollment Category	Used for returning students only	Used for returning students only	Default values must be selected
All other parameters	Default values must be selected	Default values must be selected	Default values must be selected
	Individual units can be specified for pre-enrollment.	Individual units can be specified for pre-enrollment.	The pre-enrollment process cannot pre-enroll units entered as parameters because it does not recognize students associated with these units as commencing students.

4.4.9 Viewing List of Pre-enrolled Students

The Batch Pre-Enrollment Process with Log Creation Date concurrent process is run to view exception reports from previous runs.

Enter either the log creation date, if known, or at least a combination of the parameters that are mandatory for the Batch Pre-Enrollment Process concurrent process:

- The academic period
- The term calendar

- The enrollment period, for returning students

You can enter additional parameters specific to the pre-enrollment concurrent process you ran for a more accurate and faster search.

You can limit the report by one or a combination of the parameters for the Batch Pre-enrollment Process concurrent process and also by the unit sets, units, and unit classes in which students were pre-enrolled.

Prerequisites

Refer to [Prerequisites](#) for [Running Batch Pre-enrollment Process](#).

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Batch Pre-enrollment Process with Log Creation Date concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. If known, select the date on which Batch Pre-enrollment Process was run and the log created.
3. If the log creation date is not known, enter the academic period and term calendar
4. To set the parameters, refer to the following table.

The following table describes Batch Pre-enrollment Process with Log Creation Date concurrent process parameters.

Table 4–4 Batch Pre-enrollment Process with Log Creation Parameters

Parameter	Description
Select Either Log Creation Date	Select the log creation date of the previous batch pre-enrollment.
Or a Combination of (Academic Period	Or You must select the academic period of the previous batch pre-enrollment. This is a mandatory parameter if the Select Either Log Creation Date field is left blank.

Table 4–4 (Cont.) Batch Pre-enrollment Process with Log Creation Parameters

Parameter	Description
Term Calendar	And You must select the term in the academic period above of the previous batch pre-enrollment. This is a mandatory parameter if the Select Either Log Creation Date field is left blank.

4.5 Enrolling Students

4.5.1 Overview

Enrollment can be divided into the following headings:

- [Enrolling Program Attempts](#)
- [Lapsing Program Attempts](#)
- [Managing Intermissions in Program Attempts](#)
- [Managing Discontinuations in Program Attempts](#)
- [Transferring Students between Program Attempts](#)
- [Managing Term Records](#)
- [Enrolling Unit Sets](#)
- [Enrolling Unit Attempts](#)
- [Discontinuing Unit Attempts](#)
- [Transferring Unit Sections](#)
- [Overriding Existing Validations](#)
- [Managing Administrative Holds](#)
- [Enrolling Waitlisted Students](#)
- [Managing Timeslots](#)
- [Viewing Students with Failed Minimum Credit Points](#)
- [Using National Student Clearinghouse Snapshots](#)
- [Viewing Student Program and Unit Attempt History](#)

- [Generating Enrollment Statistics](#)

4.5.2 Enrolling Program Attempts

A student program attempt is the program offering in which the student is enrolled. It can contain other program details that can include primary program, fee, and correspondence categories, funding source, occupational titles, and exam location information.

Program details can also include *special requirements*, which are user-defined requirements that a student must satisfy. Advanced standing information, that the educational institution may have granted the student can also be viewed from the student program attempt.

Enrolling program attempts includes the following tasks:

- [Creating an Enrollment Session](#)
- [Creating Student Enrollments](#)
- [Creating a Student Program Attempt Record](#)
- [Adding Award Aim Details](#)
- [Viewing Occupational titles](#)
- [Adding Special Requirements](#)
- [Importing Legacy Program Attempt Data](#)

4.5.2.1 Creating an Enrollment Session

To create program attempts directly in Enrollment or to view details of existing program attempts, you must first specify details of the enrollment session. Administrators may, if required, change the session details for a student.

You need to set these details only the first time you start an enrollment session. For all subsequent sessions, the previous session details are retrieved. Previous session details can be modified, if required and used for the current session.

The following table lists the parameters for an enrollment session:

Table 4–5 Enrollment Session Details

Parameter	Description
Academic Calendar	Denotes the year in which enrollment is occurring. During the enrollment process, the academic period restricts program availability to those being offered in the period indicated.
Enrollment Method	Defines the procedure to be used for enrolling a student.
Enrollment Category	Defines a group of students passing through the same enrollment process.

A combination of *enrollment method*, *enrollment category* and *student commencement type* determines which tabs and buttons are displayed, and therefore the kind of Enrollment functionality that is available. For more information, refer to [Creating a Student Program Attempt Record](#).

The values for a student’s enrollment may not match these parameters, for example, when a student is enrolled in an *off-campus* program, but the enrollment session is for *on-campus* enrollments. In such situations, Oracle Student System merges the session details with the student information and uses the characteristics of both to define the enrollment session.

For each student, when users do not indicate the enrollment category, Oracle Student System derives the enrollment category.

Prerequisites

- Academic calendars are defined.
- Enrollment categories are defined.
- Enrollment methods are defined.

Navigation

Enrollments > Student Enrollments

Steps

1. Click **Alter Session**. The Session Details window is displayed.
2. Enter data in appropriate fields:
 - From the Academic Calendar list of values, select the academic calendar relevant to the enrollments being processed.

- From the Enrollment Category list of values, select the default enrollment category.
 - From the Enrollment Method list of values, select an enrollment method to process enrollments.
3. Click **OK**. The Student Enrollments window is displayed with the specified enrollment session details.
 4. Save your work.

4.5.2.2 Creating Student Enrollments

You can create student enrollments using the Student Enrollments window. Users only create the student enrollment record in this window, for purposes of direct enrollment. The student information can be updated for any student by querying and adding modified details.

A *student enrollment record* comprises of all the necessary information required for enrolling a student. For students who have their details entered in Admissions, the related data including name, address, and program attempts are already available.

Name, Identification, Gender, Date of Birth, and the Deceased check box can be created or updated in this window. Other functionality available will depend on the enrollment category setup.

The following table details the information you can view, add, and modify in this window:

Table 4–6 Student Enrollments Window Description

Button	Description
Alternate IDs	Alternate Identifier information such as Driver's License number and Social Security Number (SSN). For more information on alternate IDs, see <i>Oracle Student System Implementation and Administration Guide</i> .
Addresses	Address to be used for postal communication.
Special Needs	Disability information such as those related to vision and hearing.
Notes	Supplementary information such as financial and academic notes.
Statistics	Statistical details such as voter registration and income tax details.

Table 4–6 (Cont.) Student Enrollments Window Description

Button	Description
Person Details	Student-related personal information entered in the Person subsystem. For more information on personal information, see Person Details in Person.
Program Attempts	Program attempt related information.

Prerequisites

Enrollment session is defined.

Navigation

Enrollments > Student Enrollments

Steps

1. Enter basic student information such as last and first names, prefix, person number, gender, and date of birth to create a new student enrollment record.
2. To update an existing enrollment record, query for the appropriate student.
3. To specify alternate IDs for the student, such as driver’s license and Social Security number (SSN), click **Alternate IDs**. The Person Details window is displayed.
 1. Click the **Identifier** tab.
 2. Select an ID type from the Person ID Type list of values.
 3. Enter the appropriate region for the student in the Region field.
 4. Enter the ID for the ID type in the Alternate Person ID field.
4. To modify the mailing address, click **Addresses**. The Person Details window is displayed. This window displays person details as entered in the Person subsystem. For more information, see [Person Details](#) in Person.
5. To identify special needs for a student, such as hearing or vision impairment, click **Special Needs**. The Persons Special Needs window is displayed.
 1. Select a special need type from the Special Need Type list of values.
 2. You can specify provisions associated with special needs using the Special Needs Allowance and Additional Support Levels fields. These include extra

time for examinations and additional support levels, such as a class and lab aide.

6. To enter additional information about the student, program attempts, or unit set attempts, click **Notes**. The Person Notes window is displayed.
 1. Select a note type from the Person Note Type list of values.
 2. Set a period for which the note is valid by using the Start Date and End Date fields.
 3. Click **Edit Note** to open the Text Notes window, where you can enter the required information.
7. To enter student details on demography, language, proficiency, voting, and income tax, click **Statistics**. You can then add the relevant information in the Person Statistics window.
8. Click **Holds** to open the Person Hold Details window and view hold details for a student. For more information on Holds, see *Oracle Student System Implementation and Administration Guide*.

You can also modify administrative hold details in Enrollment. For more details, refer to [Managing Administrative Holds](#).
9. Click **Person Details** to enter details like a student's person type, contact information, marital status, religion, and housing status in the Person Details window.
10. Save your work.

4.5.2.3 Creating a Student Program Attempt Record

A *student program attempt record* consists information related to program attempts for which the student has enrolled. To access the Student Program Attempt window, you must first query for a student record in the Student Enrollments window, and then click the Program Attempts button.

You use the Student Program Attempt window to view and add program attempt related information. The session details, together with enrollment category setup, control the content and layout of the Student Program Attempt window.

Student program attempts are created either by triggering the pre-enrollment process from Admissions or by directly creating the program attempt in Enrollment. Direct enrollment is only permitted if the Program Add Allowed check box is selected for the enrollment category specified in the enrollment session details. If pre-enrollment is triggered on **Offer-Response** from Admissions, the

student program attempt is confirmed. In Enrollment, you can select the Confirm check box in the Student Program Attempt window.

Each program attempt has an associated status that specifies the state of the student program attempt.

The following table describes each of these statuses.

Table 4–7 Student Program Attempt Statuses

Status	Description
Unconfirm	When a student is admitted to a program, but has not confirmed his or her intention to enroll
Inactive	When a student has accepted an admission offer and confirms the intention to enroll, but has no enrolled units
Enrolled	When the student has Enrolled unit attempts
Intermit	When a student is granted an intermission or break in the program. Once the intermission expires, the status will revert to Inactive or Enrolled .
Lapsed	When a returning student fails to enroll into units within the given time frame
Discontin	When a student withdraws from the program
Complete	When the student finishes the program

The status of a program attempt is derived dynamically when any relevant enrollment detail is changed. Critical dates can affect the status of a program attempt. The Student Program Attempt Update concurrent process is run to update program attempt statuses when critical dates have been reached. For more information, refer to [Discontinuing Program Attempts for Future Dates](#).

The derivation logic by which program attempt statuses are determined is used to assign a status to student program attempts. For more information, see *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Enrollment session is defined.

Navigation

Enrollments > Student Enrollments > Program Attempts

Steps

1. Select a program code from the Program Code list of values to specify the program offering in which the student is enrolling.
2. To confirm the program attempt, select the Confirm check box.
3. When you select Confirm, the following occur:
 1. The program attempt status changes to **Inactive**.

The program attempt remains inactive until the student enrolls to units. To change the status of a program from **Inactive** to **Enrolled**, confirm pre-enrolled units or add units in self-service.
 2. The Start Date field defaults to the start date alias instance, set in the Enrollment Calendar Configuration window, if enrollment occurs before this date. If enrollment occurs after the start date alias instance, the Start Date field defaults to the current date.

The student is only able to enroll in units offered in teaching periods that end after the student's program attempt commencement date. This date can be manually updated unless unit attempts exist against the program attempt.
4. Other program details can be viewed and modified using individual tabs or buttons. Each tab or button invokes a screen where further enrollment information can be queried and modified. The tabs and buttons that are displayed and their order depend on the enrollment category and enrollment session details. For more details on enrollment categories, see *Oracle Student System Implementation and Administration Guide*.
5. Save your work.

4.5.2.4 Adding Award Aim Details

Educational institutions can define a single award for a program or can define a final award for a program version, consisting of several smaller awards. This is known as an *award aim*.

While enrolling in a program attempt, a student can enroll into the highest award that they intend to graduate with (*Bachelor of Arts*). However, an award aim indicates the lower award (*Diploma of Arts* or *Associate Degree of Arts*) the student is working towards at a given point of time. On completion of the lower award requirements, administrators upgrade the award aim to the next higher award in the program. This process continues until a student completes the program requirements and graduates. If a student decides to discontinue the program, the

student is permitted to stop and is awarded the most recently completed award aim.

You can also view all awards that the student has completed in the program attempt and track award aim history.

For more information on award aims, see *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Awards for program versions are defined.

Navigation

Enrollments > Processes > Student Program Attempt Award

Steps

1. Select a value from the Award Code list of values to add an award to the student program attempt.
2. Add start and end dates for the award in the respective fields.
3. Add the date on which the award was conferred, if applicable.
4. Select the Complete check box to mark the award as being completed.
5. Click **Derive** to automatically derive the award mark and award grade associated with the award.

You can override the award grade by selecting a value from the Award Grade list of values.

6. Click **Award History** to open the Student Program Award Attempt History window and view all the awards the student has worked for in the program.
7. Click **Special Awards** to open the Special Awards window and view any special awards, such as prizes or medals associated with the student program attempt.
8. Save your work.

4.5.2.5 Viewing Occupational titles

Occupational titles indicate occupations associated with programs. For example, for the program Bachelor of Arts in Psychology, an associated occupational title could be an Industrial Psychologist or a Health Psychologist.

For information on setting up occupational titles for programs, see *Oracle Implementation and Administration Guide*.

In Enrollment, you can access and view the occupational titles associated with a specific program attempt using the Student Program Attempt window.

Prerequisites

Enrollment session is defined.

Navigation

Enrollments > Student Enrollments > Program Attempts > Occupational Titles

Additional Notes

The Program Occupational Titles window lists the occupations associated with the program.

4.5.2.6 Adding Special Requirements

Some programs might require a student to take external program or units in order to complete the program attempt. For example, for a Physical Education program, a student might need to complete an external course, such as the Red Cross First Aid certificate, undertaken outside the program attempt.

These external programs or units are called *special requirements*. You can maintain special requirements details in the Student Program Special Requirements window. These details include the name of the unit and its completion date.

Progression rules can be set up to include special requirements. When you add special requirements, Oracle Student System inserts the current date into the Completed Date field. The completed date can be set to a previous date where required.

The following apply to adding special requirements:

- A special requirement cannot be recorded with the same code as an existing special requirement that has not expired.
- A special requirement cannot be recorded with the same code as an existing special requirement, if the date ranges overlap.

Prerequisites

Enrollment session is defined.

Program attempts are created.

Navigation

Enrollments > Student Enrollments > Program Attempts > Special Requirements

Steps

1. Query the appropriate student record. If you access the Special Requirements window through the Student Enrollments window, you do not have to query for a student record.
2. Select a value from the Special Requirement list of values, to specify a requirement necessary for program completion.
3. Enter the date of completion in the Completion Date field.
This field defaults to the current date, but can be set to a previous date.
4. Optionally, add an expiry date for the unit in the Expiration Date field.
The expiry date is the date a special requirement qualification, with a fixed lifespan, expires. The expiry date is used to confirm whether the special requirement qualification has expired, for program or progression rules that require a *current* special requirement qualification.
5. Add reference information like permit numbers, if any, in the Reference field.
6. Save your work.

4.5.2.7 Importing Legacy Program Attempt Data

Legacy enrollment data must first be loaded into the appropriate interface tables in a group with a *batch identifier*.

You run the Legacy Import Process for Enrollments and Records concurrent process to import legacy enrollment data into Oracle Student System tables. You can select the interface table from which to import information.

For information on how to populate interface tables with enrollment legacy data to eliminate errors in importing, see *Oracle Student System Open Interfaces User Guide*.

Prerequisites

Legacy enrollment data exists and is loaded to interface tables.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Legacy Import Process for Enrollments and Records concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Legacy Import Process for Enrollments and Records concurrent process parameters.

Table 4–8 Legacy Import Process for Enrollments and Records Parameters

Parameter	Description
Batch Identifier	Select the batch identifier of student registration details uploaded to the interface table and used to update student program and unit attempts in Oracle Student System. This is a mandatory parameter.
Table Name	Defaults to All Tables . Select at least one interface table related to Records or Enrollment. This is a mandatory parameter.
Delete Successfully Imported Interface Records	Defaults to No . Retain the default or select Yes to delete interface records once imported into Oracle Student System. This is a mandatory parameter.

4.5.3 Lapsing Program Attempts

A student program attempt lapses when the student does not enroll in units within the specified time. For example, a student may fail to enroll to units even after providing the institution a confirmed intention to enroll.

While lapsing student program attempts, you perform the following tasks:

- [Lapsing a Program Attempt Manually](#)
- [Running Student Program Attempt Lapsed Process](#)
- [Viewing Lapsed Program Attempts](#)

4.5.3.1 Lapsing a Program Attempt Manually

You use the Student Program Attempt window to lapse student program attempts manually.

Administrators can *re-instate* lapsed program attempts. In case of returning students, educational institutions specify a lapsed date alias in the Enrollment Calendar Configuration window, by which the students should re-enroll. If returning students fail to do so, their program attempts are lapsed when the Student Program Attempt Lapsed Process concurrent process is run. For more information, refer to [Running Student Program Attempt Lapsed Process](#).

Prerequisites

Inactive program attempts exist.

Navigation

Enrollments > Student Enrollments

Steps

To lapse a student:

1. Query the appropriate student record in the Student Enrollments window.
2. To manually lapse a program attempt, click **Program Attempts**.
3. In the Student Program Attempt window, select the Lapsed Date tab.
4. Enter the lapsed date.
5. Save your work.

To re-instate a lapsed student:

1. Open the Student Program Attempt window, and select the Lapsed Date tab.
2. Delete the lapsed date in the field. The program attempt status changes to **Inactive**. The program attempt status changes to **Enrolled** when units are added to the program.

4.5.3.2 Running Student Program Attempt Lapsed Process

You run the Student Program Attempt Lapsed Process concurrent process to update the status of program attempts that are **Inactive**, within an academic period, to **Lapsed**. You can enter the number of grace days applicable to the program attempt, after which the status will change.

This concurrent process inserts a lapsed date for the student program attempt, except in the following situations:

- The student is pre-enrolled in the academic year.
- The enrollment form due date for the pre-enrolled period, including the grace days, has not yet passed.
- The override form due date, including the grace days, has not yet passed.

From the lapse date to the end of the period, records are not lapsed. A new concurrent process request is submitted in the subsequent academic period. You can reset student program attempt statuses to **Inactive** by deleting the lapsed date in the Student Program Attempt window. Typically, student program attempts become inactive when a student completes all unit attempts. The lapse date alias, typically set near the end of a period, prevents valid program dates from being lapsed.

The Student Program Attempt Lapsed Process concurrent process can be run by an Enrollment specialist weekly.

This concurrent process produces a report, detailing all lapsed student program attempts. For more information, refer to [Viewing Lapsed Program Attempts](#).

Prerequisites

Inactive program attempts exist.

Lapsed date aliases are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Student Program Attempt Lapsed Process concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. Enter a possible teaching period, organization, program, or enrollment category of program attempts that the process must consider in the given academic period.
3. If required, enter the number of grace days after which you can change the status.

4. To set the parameters, refer to the following table.

The following table describes the Student Program Attempt Lapsed Process concurrent process parameters.

Table 4–9 Student Program Attempt Lapsed Process Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as a comment on the first page of the report.
Academic Period	Select the academic period for which the concurrent process must consider inactive student program attempts. This is a mandatory parameter.
Term/Teaching Period	Select to limit the inactive student program attempts considered, by a term or teaching period within the given academic period.
Responsible Organization Unit	Select to limit the inactive student program attempts considered, by an organizational unit responsible for program version or unit set.
Program Code	Select the program for which the concurrent process is to check inactive student program attempts.
Enrollment Category	Select to run the concurrent process to update the inactive program attempts for a selected enrollment category.
Grace Days	Enter the number of days after the past enrollment form and override form due dates during which inactive student program attempts are not lapsed.

4.5.3.3 Viewing Lapsed Program Attempts

Run the Student Program Attempt Lapsed Process with Log Creation Date concurrent process to view program attempts that were lapsed by the Student Program Attempt Lapsed Process concurrent process.

If known, you need to enter the date on which the Student Program Attempt Lapsed Process concurrent process was run or enter a combination of academic period, teaching period, organization, program code, enrollment category, and grace days.

Prerequisites

The Student Program Attempt Lapsed Process concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Student Program Attempt Lapsed Process with Log Creation Date concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Student Program Attempt Lapsed Process with Log Creation Date concurrent process parameters.

Table 4–10 Student Program Attempt Lapsed Process with Log Creation Date Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.
Select Either Log Creation Date	Select a log creation date of the previously run Student Program Attempt Lapsed Process that you want to view.
Or a Combination of (Academic Period	Or Select the academic period for which the process was run.
Term/Teaching Period	And Select the term or teaching period within the given academic period, if the same was specified in the Student Program Attempt Lapsed Process.

4.5.4 Managing Intermissions in Program Attempts

An educational institution can temporarily suspend students from enrolling in a confirmed program attempt. This temporary suspension from a program is different from an academic hold, in which the institution suspends a student from a program for academic reasons. On the other hand, students can also temporarily suspend their enrollment to program attempts. For example, a student may need to take a leave of absence for medical reasons or need to take part in sports events for the college or country.

This temporary suspension from enrollment is called *intermission*. In the career-centric mode, only primary programs can be intermitted. All secondary programs within the career are automatically intermitted.

While intermitting students, you perform the following tasks:

- [Intermitting Students](#)
- [Re-enrolling an Intermitted Student](#)

4.5.4.1 Intermitting Students

Each intermission has an associated *intermission type*. You can define intermission types that require an approval from the educational institution. Intermission types are defined during setup. For more details on intermission types, see *Oracle Student System Implementation and Administration Guide*.

You specify the start and end dates for the *intermission period*. The end date specifies the date when the student is due to resume the program attempt. The maximum permissible intermission period is set at the program level.

The end date could be the start date for a teaching period. If the period of intermission overlaps the census date of any teaching calendars in which there are enrolled unit attempts, the enrolled unit attempts are dropped or discontinued.

For more information on the census date, see *Oracle Student System Implementation and Administration Guide*.

Workflow notifications are sent to students in the following cases:

- The intermission request is saved.
- The intermission dates are modified.
- The intermission is approved.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For more information on creating workflows for business events, see *Oracle Workflow User's Guide*.

Prerequisites

Intermission is set up as a valid enrollment category step.

Navigation

Enrollments > Student Enrollments > Program Attempt > Intermission

Steps

1. Select an intermission type from the Intermission Type field.
2. Enter the period of intermission in the start and end date fields.
3. Select the Voluntary check box if the student has requested for intermission.
4. If the student is requesting intermission to study at another institution, optionally enter the credit point and term details in the Another Institution Details tab.

A student must complete the required number of units to request for an intermission.

5. If the intermission requested requires approval, select Approved and enter the approver's details.
6. Save your work.

Additional Notes

You can open the Intermission window from the following location:

When accessed from the Processes menu, you have to query for a student record.

Enrollments > Processes > Intermission

4.5.4.2 Re-enrolling an Intermitted Student

Most intermissions are set to end on the first day of a new teaching period. However, students can be re-enrolled before the end date of an intermission.

Students can also be re-enrolled after the intermission period is over. You can add unit attempts for teaching periods whose census date is not overlapped by the intermission period. For more information, refer to [Enrolling Unit Attempts](#).

Prerequisites

Intermitted program attempts exist.

Navigation

Enrollments > Processes > Intermission

Additional Notes

Query the appropriate student record and adjust the end date of the intermission period.

If the student has any enrolled units, the program attempt status is set to **Enrolled**. If the student does not have any enrolled units, the program attempt status is set to **Inactive**.

4.5.5 Managing Discontinuations in Program Attempts

A student can end a program or unit attempt before its completion. Administrators can also end a unit or program attempt before the student completes it.

You can perform the following tasks while discontinuing program attempts:

- [Discontinuing Program Attempts Manually](#)
- [Discontinuing Program Attempts for Future Dates](#)
- [Viewing the Program Attempt Discontinuation Report](#)

4.5.5.1 Discontinuing Program Attempts Manually

Discontinuation is usually initiated by students indicating that they wish to exit the program. The discontinuation of a student's program attempt automatically discontinues any associated unit attempts.

Prerequisites

Administrative unit statuses are defined.

Discontinuation date aliases are defined.

Discontinuation reason codes are defined.

Program discontinuation is set up as a valid enrollment step.

Navigation

Enrollments > Student Enrollments

Steps

To discontinue a program attempt:

1. Query the appropriate student record in the Student Enrollments window.
2. Click **Program Attempts**.
3. In the Student Program Attempt window, select the Discontinue tab.
4. Enter the discontinuation details that include the date, type, and reason for discontinuation.

5. Save your work.

To reinstate a discontinued program attempt:

1. In the Student Program Attempt window, select the Discontinue tab.
2. Delete the discontinuation date.
3. Save your work.

4.5.5.2 Discontinuing Program Attempts for Future Dates

To discontinue a program attempt for a future date, run the Student Program Attempt Update concurrent process. By running this process, you can remove unwanted data and thus reduce processing time.

The Student Program Attempt Update concurrent process updates student program attempt records under the following conditions:

- Intermission period has started, and the student program attempt status is not **Intermit**
- Intermission period has ended, and the student program attempt status is still **Intermit**
- Enrollment form due date has passed, the student program attempt status is **Enrolled**, and no enrolled unit attempts are added
- Teaching calendar start date for the unit attempt has passed, and the student program attempt status is **Inactive** or **Lapsed**
- Future discontinuation date has passed, and the student program attempt status is still **Enrolled**

The Student Program Attempt Update concurrent process does not have any parameters.

This concurrent process should be run nightly.

4.5.5.3 Viewing the Program Attempt Discontinuation Report

Run the Student Program Attempt Future Discontinuation Report concurrent process to view the student program attempt discontinuation report. This report lists student program attempts for future dates that are discontinued using the Student Program Attempt Update concurrent process.

Prerequisites

The Student Program Attempt Update concurrent process has been run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Student Program Attempt Future Discontinuation Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Student Program Attempt Future Discontinuation Report concurrent process parameters.

Table 4–11 Student Program Attempt Future Discontinuation Report Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.
Creation Date	Select system-generated date indicating when the record is created.
Report Exceptions Only (Y/N)	Defaults to No . Select to report exceptions only.

4.5.6 Transferring Students between Program Attempts

An enrolled student can request a transfer to another program, unit, or unit sets. A student can transfer from a generic program to a specialized one, as students do not normally graduate from generic programs. A research candidacy record can only be transferred to a research program. Before transferring a student, the educational institution might require a student to apply for entry to the new program. In such cases, the transfer would be initiated in Admissions and completed in Enrollment.

While transferring program attempts, you can perform the following tasks:

- [Transferring Program, Unit, and Unit Set Attempts](#)
- [Changing a Program Offering Option Manually](#)
- [Running Bulk Program Offering Option Process](#)
- [Running Bulk Program Offering Option Transfer Process with Log Creation Date](#)

4.5.6.1 Transferring Program, Unit, and Unit Set Attempts

For transfers between programs, both the original and destination programs must be members of the same program group and transfer group type.

In the career-centric mode, a *destination program attempt* must exist before the transfer is initiated. For a transfer, the *original program attempt* must be marked as secondary, while the destination program attempt must be made the primary program attempt.

In the program-centric mode, a program attempt in the destination program need not exist before attempting the transfer and you can simply select the destination program attempt in the Program Transfer window.

A transfer automatically discontinues the original program attempt. A student may apply for advanced standing in the destination program either before or after transfer to gain credit for previous units taken in a different program, or for non-transferable units that can be considered as electives in the destination program. Once a student is transferred, the original program attempt is discontinued.

On transferring, a business event is raised that notifies students and administrators of the program transfer.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

The following apply to a transfer:

- If either superior or subordinate unit attempts are enrolled, but not transferred to the destination program, then both the superior and subordinate unit attempts are dropped or discontinued.
- The educational institution is responsible for ensuring that the student has the right *core* unit attempts in the destination program. After the program transfer, the new program attempt may have additional core units that are not defined in the pattern of study and must be added to the program attempt.
- The educational institution is also responsible for ensuring that the student is enrolled in the right year of program in the destination program. For information on transferring students between programs with different calendar types, with respect to HESA returns, see *Oracle Student System for the United Kingdom User Guide*.
- Unit attempts can be transferred if they have a status of **Enrolled**, **Waitlisted**, **Discontinued with Failed**, or **Completed**.

- Any enrolled unit attempts that are not selected for transfer will be discontinued.
- **Discontinued with Failed** and **Completed** unit attempts are transferred as duplicate unit attempts. When other system processing encounters these duplicates, Oracle Student System determines the relevant information, such as grades and credit points, from the original unit attempt.

Prerequisites

Program groups are defined.

Transfer is a valid enrollment procedure step.

The original program and the destination program are of the same program type group.

The original program and the destination program are of the same fee category.

The program is of type designated for transfers.

The program to be transferred has a status of **Inactive**, **Enrolled**, **Discontinued with Failed**, **Intermit**, **Completed**, or **Lapsed**

Units to be transferred have a status of **Enrolled**, **Completed**, **Waitlisted**, or **Discontinued with Failed**.

Navigation

Enrollments > Student Enrollments

Steps

1. Query the appropriate student record.
2. Click **Program Attempts**. The Student Program Attempt window is displayed.
3. Select the program to be transferred. To initiate a transfer, users must be in the context of the original program attempt.
Note: In the career-centric mode, the destination program must exist.
4. Click **Transfer**. The Process Program Transfer window is displayed with details of the original program. The Student Program Attempt region displays details of the destination program attempt.
5. Select Transfer All to transfer the program attempt completely.
6. Enter the following transfer details.

1. If the student program attempt has an associated candidacy record, click **Transfer Candidature** in the Process Program Transfer window to transfer research candidacy details to the new program attempt.

2. In the Process Program Transfer window, click **Unit Details** to select unit attempts that need to be transferred. Save your work.

All units in the original program are displayed and units transferred are marked with an asterisk.

3. To transfer unit sets, select the desired unit set attempts for transfer that count towards the new program completion and click **Unit Set Details**. Save your work.

7. To finalize the transfer process, select the enrolled units and unit sets to be transferred and click **Transfer Program**.

8. Save your work.

4.5.6.2 Changing a Program Offering Option Manually

Once enrolled, a student can request a change in the program location, attendance mode, or attendance type. The academic calendar and program version can also change. A change in any of the above details alters the student *program offering option* details.

For more details on program offering option, see *Oracle Student System Implementation and Administration Guide*.

The educational institution can, however, specify a *forced component* for a student enrolled in a program offering option. A forced component implies that the student must take the program at a particular location, or with a particular attendance mode or attendance type. A forced component is indicated by the # symbol. You can override this forced option.

For more information on forced components, see *Oracle Student System Implementation and Administration Guide*.

A change in program offering option is not allowed if the program attempt status is **Discontin**, **Completed**, or **Lapsed**.

When a program offering option is changed, a business event is raised, which notifies students and administrators of the change.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

You can also run a concurrent process to change program offering options. For more information, refer to [Running Bulk Program Offering Option Transfer Process with Log Creation Date](#).

The program offering option for a specific term can also be changed in the Term Records window. For more information, refer to [Managing Term Records](#).

Prerequisites

Change To Program Offering Option Of A Student Program Attempt is a valid enrollment category procedure step.

Navigation

Enrollments > Processes > Program Offering Option

Steps

1. Query for an appropriate student record in the Change Student's Program Offering Option window. The Change Student's Program Offering Options region displays several program offering combinations.
2. Select a program offering combination.
3. Click **Change Option**. A message box appears, confirming the action.
4. Click **OK**. The Effective Term dialog box appears. It prompts you to enter the term for which you are changing the program offering option.
5. Enter the term and click **OK**. The new program offering options replace the old values.
6. Save your work.

4.5.6.3 Running Bulk Program Offering Option Process

The Bulk Program Offering Option Transfer Process concurrent process transfers a set of students between program offering options within the same program or between program versions by performing the following tasks:

- The academic calendar of the student program attempts are changed to another academic calendar in which the program is offered.
- The program versions of the student program attempts are changed to another version.
- The program offering option attributes of the student program attempts are changed to the attributes of another program offering option.

The Bulk Program Offering Option Transfer Process concurrent process is run in immediate mode or as a scheduled request, as required, by an Enrollment specialist.

The Bulk Program Offering Option Transfer Process concurrent process produces a report listing results, errors, and warnings.

Prerequisites

Refer to [Prerequisites](#) for [Transferring Program, Unit, and Unit Set Attempts](#).

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Bulk Program Offering Option Transfer Process concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Bulk Program Offering Option Transfer Process concurrent process parameters.

Table 4–12 Bulk Program Offering Option Transfer Process Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.
Report Level	Select the level of detail required to run the concurrent process and generate the exception report. Defaults to Errors .
Academic Period	Select the academic period from which the student program attempts are selected for transfer. This is a mandatory parameter.
Program Code	Select the program within which students are transferred between offering options.
Version Number	Select the program version number.
Location Code	Select the location with the attendance mode that has to be transferred.

Table 4–12 (Cont.) Bulk Program Offering Option Transfer Process Parameters

Parameter	Description
Student Selection Attendance Mode	Select the attendance mode to be transferred.
Student Selection Attendance Type	Select the attendance type to be transferred.
Person ID Group	Select the person ID group.
Program Attempt Status 1	Select the program attempt status. You can select up to five program attempt statuses.
Calendar Type	Select the academic calendar for the program offering option to which students are transferred. A calendar type is not specified when a program offering option is being transferred to another program offering option in the same academic period.
New Program Version Number	Select a new program version number, entered only when student program attempts are transferred between different program versions.
New Program Location Code	Select the location code of the student program attempts created by this concurrent process. If this parameter is not entered, each new student program attempt has the same location code as the program attempt from which it is transferred.
New Program Attendance Mode	Select attendance mode of student program attempts created by this concurrent process. If this parameter is not entered, each new student program attempt has the same attendance mode as the program attempt from which it is transferred.
New Program Attendance Type	Select attendance type of student program attempts created by this concurrent process. If this parameter is not entered, each new student program attempt has the same attendance type as the program attempt from which it is transferred.
Effective Term	Select term for which the program offering option change is valid. This is a mandatory parameter.

4.5.6.4 Running Bulk Program Offering Option Transfer Process with Log Creation Date

Run the Bulk Program Offering Option Transfer Process with Log Creation Date concurrent process to view program offering options transferred through the Bulk Program Offering Option Transfer Process concurrent process.

If known, you need to enter the date on which the Bulk Program Offering Option Transfer Process concurrent process was run or enter a combination of parameters including academic period, program code, version number, location code, attendance mode and type, person ID group, and program attempt statuses.

Prerequisites

The Bulk Program Offering Option Transfer Process has been run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Bulk Program Offering Transfer Process with Log Creation Date concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. If known, select the date on which the Bulk Program Offering Option Process concurrent process was run and the log created.
3. If the log creation date is not known, enter the academic period and a combination of the parameters available.
4. The parameters for the Bulk Program Offering Transfer Process with Log Creation Date concurrent process are similar to Bulk Program Offering Transfer Process. For parameter-related information, refer to [Running Bulk Program Offering Option Process](#).

The only additional parameter is Select Either Previous Log. Select a log creation date of the previously run Bulk Program Offering Transfer Process concurrent process, that you want to view.

4.5.7 Managing Term Records

A *term record* stores the *effective* values for a term, including program, organization, location, attendance type and mode, primary and key program details, and fee category.

Term records are created or updated in the following situations:

- Unit attempts are enrolled or waitlisted
- Program offering option is changed
- Program transfer is initiated
- Primary program is changed
- Primary program is completed
- Key program is changed
- Class standing overrides are changed

When you make changes to program attempt details, enter the associated term in the Term Record popup window.

Oracle Student System provides a very limited number of terms from which you can indicate an effective term. This list is further restricted in case of program transfer and primary program changes. In such cases, the change is effective only for the current term and the subsequent term.

When program transfers are performed across term boundaries, the enrolled unit attempts are discontinued against the original program attempt and they are not re-instated against the destination program attempt.

Users can update term records using one of the following methods:

- For any attribute of a term record, the user can update the attribute in the Student Enrollment window and indicate the effective term. This change is updated for the indicated term as well as any existing term records that follow the indicated term.
- Users can also update the program offering option and fee category in the term record window. This is a single update that affects only one row.

Once a term record is created, the application creates term records for subsequent periods, providing one of the specified actions- enrolled or waitlisted unit attempt, program offering option, fee category charge, primary program change, program transfer-occurs.

If there is a period during which none of the specified enrollment activities takes place, no term records are created for the period. Once an enrollment activity takes place after a period of inactivity, the system will populate the term records for the period.

The following apply to term records:

- There is a single term record for each term per primary program.
- A term record continues to exist after all associated unit attempts are dropped or discontinued.
- In a program-centric mode, a term record is created for each program attempt in a term.
- In a career-centric mode, a term record is created for each career attempt, with primary-program information.
- When the legacy import process is run, it does not update term records that already exist.

Prerequisites

Program attempts exist.

Navigation

Enrollments > Student Enrollments > Student Program Attempt > Term Records

Steps

1. Query the appropriate student. Term record details for the student are displayed in chronological order. The enrollments category and session determine the fields that you can update in this window.
2. Enter modified values in the fields that you want to update. You can update values only for a program offering option, fee category, and class standing override.
3. Save your work.

Additional Notes

You can open the Term Records window from the following location:

When accessed from the Enrollments menu, you do not have to query for a student record.

Enrollments > Term Records

4.5.8 Enrolling Unit Sets

Students enrolled in a program may also enroll in unit sets for that program. Each unit set defines the path of study selected by the student. Unit sets can represent units for the major or minor of the program. For example, a student may enroll for a program in Economics with Accounting and Banking as majors for the program. Unit sets may also represent *streams* or *concentrations* and are also used to designate *years* of the program when the year of program mode is used.

In the year of program mode, students can be enrolled in unit set attempts through pre-enrollment. Users create a sequence of unit sets that represents the year of program. They can also map unit sets that represent streams or concentrations to these *year* unit sets. Based on the progression of outcome of **Advance**, the student is pre-enrolled in the subsequent year of program and any mapped unit sets.

The following apply to enrolling unit sets to a student program attempt:

- A student can be enrolled to a unit set if the student program attempt status is **Enrolled** or **Inactive**. A unit set can be added to a student's program attempt where the status is **Completed**, provided the student has not yet graduated. Expired unit sets can only be selected where the student has previously been enrolled in the unit set within the same program offering, before the unit set expired.
- A subordinate unit set is specified by selecting the Subordinate check box and establishing a relationship with the superior unit set. If a subordinate unit set is selected as part of a student program attempt, the superior unit set must also be selected for the student program attempt.
- A subordinate unit set must have a parent unit set specified.
- A subordinate unit set cannot be confirmed where the parent unit set has not been confirmed.
- Unit sets cannot be deleted where the unit set has been completed or ended.
- A student unit set attempt cannot be selected where the same unit set exists with an open end date.
- Where a parent unit set is ended, the subordinate unit sets will also be ended.
- A unit set cannot be deleted where it is the parent of an existing subordinate unit set.

When students satisfy requirements and complete a unit set, administrators can enter the completion details. You can also specify whether a student wants to voluntarily withdraw from a unit set and add authorization details. These details are added for the following circumstances:

- When the Authorization Required check box has been selected for the unit set in the Maintain Unit Sets window.
- When the unit set is being ended and was part of an admission offer, such as a conditional offer.

Prerequisites

Unit sets, unit set categories, and unit set codes are defined.

Requirements for authorization are defined.

Navigation

Enrollments > Student Enrollments > Program Attempt > Unit Sets

Steps

1. Select a unit set code from the Unit Set Code list of values.

By default, the version number, unit set category, and rank fields display the associated details. For more information on unit set codes, see *Oracle Student System Implementation and Administration Guide*.
2. To confirm the unit set, select the Confirmed check box and save.
3. The selection date defaults to the current date after the record is confirmed and saved. This date can be changed. However, it cannot be backdated prior to the commencement of the program attempt.
4. The Catalog field displays the term calendar associated with the unit set. This date can be backdated.
5. Click **Unit Set Hierarchy** to view the relationships between the selected unit sets.

The following table describes additional parameters in the Unit Set Attempt window.

Table 4–13 Unit Set Attempt Window Description

Field	Description
Include Ended Unit Set	If selected, both ended and current unit sets are displayed.
Version Number	Version number for the unit set.
Unit Set Category	Unit set category for the unit set. For more information on unit set categories, see <i>Oracle Student System Implementation and Administration Guide</i> .
Rank	Rank for the unit set. For more information on ranks, see <i>Oracle Student System Implementation and Administration Guide</i> .
Primary Set	Select to indicate the main unit set for display on documentation. Multiple primary sets of the same rank, can be selected. A primary set cannot be selected where a student unit set attempt of a higher rank exists.
Title	Title of the unit set.
Completed	Select to indicate that student has completed the program.
Completion Date	Enter the program completion date.
Completion Source	Select whether program completion source is manual or system-driven.
Voluntary Ending	Select if student voluntarily ends the unit.
End Date	Specify date of voluntary ending.
Parent Unit Set	Add parent unit set details if a superior unit exists.
Selection Date	Add selection date for parent unit set.
End Date	Add end date for parent unit set.
Authorized By	Add name of person who authorizes the specified details.
Authorized On	Add date of authorization.

Additional Notes

You can open the Unit Set Attempt window from the following location:

When accessed from the Processes menu, you have to query for a student record.

Enrollments > Processes > Unit Set Attempt

4.5.9 Enrolling Unit Attempts

To complete a program attempt, students must enroll into individual units. Educational institutions define validations that need to be applied to determine whether or not a student is eligible for enrollment. These validations are configured as part of the enrollment category.

Specified validations are considered when the bulk unit enrollment process is run or when users add unit attempts in self-service. For information on setting up validations for enrollment, see *Oracle Student System Implementation and Administration Guide*.

Administrators can override validations for students and therefore allow enrollment.

Unit enrollment can also be influenced by *holds* against a student. Holds can restrict a student's enrollment eligibility.

While enrolling unit attempts, you may perform the following tasks:

- [Running Bulk Unit Enrollment/Discontinuation Process](#)
- [Uploading Unit Attempts](#)
- [Verifying Unit Attempts Against Unit Rules](#)
- [Viewing the Unit Rules Check Exception Report](#)
- [Running Batch Registration Date Update Process](#)
- [Viewing the Batch Registration Update Exception Report](#)

4.5.9.1 Running Bulk Unit Enrollment/Discontinuation Process

You run the Bulk Unit Enrollment/Discontinuation concurrent process to add a confirmed or unconfirmed unit attempt to a student program attempt, add data specified as parameters to unit attempts enrolled or discontinued by the concurrent process, and discontinue unit attempts.

The Bulk Unit Enrollment/Discontinuation concurrent process is run in immediate mode or as a scheduled request by an Enrollment specialist. This concurrent process generates a report listing results, errors, and warnings. You can use this process to enroll a single student by person number, a group of students by person ID group, or all students. You can enroll a student or students into a specified unit section by entering a combination of the relevant parameters.

The behavior of the concurrent process can be categorized into the following:

- Report parameters
- Student selection parameters
- Unit parameters
- Enrollment parameters
- Discontinuation parameters

Enrolled Units

For each enrolled unit, the concurrent process performs the following tasks:

- Checks that enrollment is attempted within the enrollment variation period. Students are not enrolled after the enrollment variation period.
- Checks to ensure that a unit is offered in the specified teaching period.
- Selects student program attempts based on the parameters specified.

Program Attempts and Units to be Enrolled

For each selected student program attempt and unit to be enrolled, the concurrent process performs the following tasks:

- Checks whether a student is already enrolled in a unit. If a student is already enrolled in a unit, the system ignores the unit based on the repeat and re-enrollment setup for the enrollment category.
- Checks student eligibility to enroll in the unit. This check includes the student program attempt status, whether the student is excluded from the unit, whether the student has advanced standing in the unit, and whether the student has an intermission during the teaching period. Enrollment is allowed for all prerequisite units that have advanced standing.

If any of these checks fail, the system does not enroll the unit and generates a report.

- Checks that a unit attempt matches a student's forced location or attendance mode, if applicable
- Checks for a term calendar in order to derive the primary program. If a term calendar does not exist, the value specified in the program attempt is considered as the primary program
- Evaluates validations set up as part of the enrollment category and enrolls or denies enrollment based on the validations

Discontinued Units

For each discontinued unit, the concurrent process performs the following tasks:

- Checks whether a unit attempt status is **Enrolled**. If a unit attempt status is not **Enrolled**, the system does not discontinue the unit and generates a report.
- Checks whether drop is allowed for a unit and if so, drops the student unit attempt. If a unit cannot be dropped, Oracle Student System discontinues the student unit attempt.

If a unit is discontinued after the last date for dropping, an administrative unit status must be entered for the Administrative Unit Status parameter. The administrative unit status is validated against the discontinuation date. For more information on administrative unit statuses, see *Oracle Student System Implementation and Administration Guide*.

The Bulk Unit Enrollment/Discontinuation concurrent process also performs the following additional checks. Details of these checks appear in the execution and exception reports.

- Checks whether a student has broken any hold restrictions, such as maximum credit points allowed.

If this check fails, all changes to the student program attempt resulting from this concurrent process are reversed.

- For a subordinate unit, checks whether an enrolled superior unit exists.

If the check fails, the unit is not enrolled.

- To enroll in a subordinate unit section, students have to be enrolled in a superior unit section. Subordinate unit sections that are set to be enrolled by default, in the Program Structure and Planning subsystem, are enrolled along with superior units.

If any validations on the superior unit section fails, the subordinate unit section is also not enrolled.

Prerequisites

Person, program, and unit eligibility steps are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Bulk Unit Enrollment/Discontinuation concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. Set the report level to display only errors, errors with warnings, or errors with warnings and information.
- 3. Enter the term calendar and the enrollment method.
- 4. Select the action **Enroll** and enter the units and unit classes that the process must enroll students in. You can override credit points and effective full time student units.
- 5. To set the parameters, refer to the following table.

The following table describes the Bulk Unit Enrollment/Discontinuation concurrent process parameters.

Table 4–14 Bulk Unit Enrollment/Discontinuation Parameters

Parameter	Description
Report Level	Select level of detail in running of concurrent process and generating exception reports. Defaults to Errors
Select Either Previous Log	Select log creation date of previously run bulk unit enrollment/discontinuation. If selected, the previous run of the concurrent process and its exception report is duplicated without further processing and all additional parameters specified are ignored.
Or the combination of the following (Teaching Period	Defines the specific teaching period in which unit attempts are to be created or discontinued. Units specified as parameters to this concurrent process must be offered in the specified teaching period. This is a mandatory parameter.
Program Code	Specify program code to limit enrolled students selected by the concurrent process to a certain program.
Term Calendar	Select the relevant term. This is a mandatory parameter.
Location Code	Specify location to limit enrolled student program attempts considered by the concurrent process to a certain location.

Table 4–14 (Cont.) Bulk Unit Enrollment/Discontinuation Parameters

Parameter	Description
Attendance Mode	Specify attendance mode to limit enrolled student program attempts considered by the concurrent process to a certain attendance mode.
Attendance Type	Specify attendance type to limit enrolled student program attempts considered by the concurrent process to a certain attendance type.
Unit Code	Select to run the process for students with this unit attempt.
Version Number	Select the version for the unit above. You can enter the version only if you have entered the unit code.
Unit Location	Select the location for the unit above.
Unit Class	Select the class for the location given above. You can enter the class only if you have entered the location.
Person ID Group	Specify person ID group to limit enrolled student program attempts considered by the concurrent process to a certain person ID group.
Person Number	Select to enroll or discontinue the unit attempts of a single student.
Enrollment Method	Select an enrollment method. This is a mandatory parameter.
Action 1	Select to discontinue the unit, details of which you enter below. Actions can be mixed within same concurrent process request. Defaults to Enroll
Unit Code 1	Select the unit to be enrolled or discontinued.
Unit Location Code 1	Select the location of the unit to be enrolled or discontinued.
Unit Class 1	Select the class of the unit to be enrolled or discontinued.
Action 2	Select a second action to be applied to the second unit, you can choose to enroll or discontinue up to 8 units in a single run. Defaults to Enroll
Unit Code 2	Select the second unit to be enrolled or discontinued.
Unit Location Code 2	Select the location of the second unit to be enrolled or discontinued.

Table 4–14 (Cont.) Bulk Unit Enrollment/Discontinuation Parameters

Parameter	Description
Unit Class 2	Select the class of the second unit to be enrolled or discontinued.
Default Unit Confirmed	If selected, records student unit attempt as Enrolled . If deselected, records student unit attempt as Unconfirm . Defaults to Yes
No Assessment	If selected, students are not assessed and do not receive formal grades in this unit. This creates an audit attempt. Defaults to No
Enrolled Date	Enter enrolled date Defaults to current date.
Exam Location Code	Select examination center code for the unit. Overrides examination location specified for student program attempt.
Alternative Title	Enter an alternative unit title assigned to student unit attempts created by this concurrent process. Overrides standard unit title when the Override Title check box is selected for unit in the Basic Unit Details window.
Override Enrolled Credit Points	Enter a value for enrolled credit points to override the standard enrolled credit points for each of the units that the student is being enrolled in by this concurrent process. The override happens only if the Override Title check box is selected for the unit in the Basic Unit Details window.
Override Achievable Credit Points	Enter a value for achievable credit points to override the standard achievable credit points for each of the units that the student is being enrolled in by this concurrent process. The override happens only if the Override Title check box is selected for the unit in the Basic Unit Details window.
Override Effective Full Time Student Units	Enter a value for effective full time student units to override the standard calculated value for each of the units that the student is being enrolled in by this concurrent process. The override happens only if the Override Title check box is selected for the unit in the Basic Unit Details window.
Override Credit Reason	Enter the reason to override enrolled or achievable credit points for students enrolled in units by this concurrent process.

Table 4–14 (Cont.) Bulk Unit Enrollment/Discontinuation Parameters

Parameter	Description
Administrative Unit Status	Select a valid administrative unit status applied to all discontinued units.
Discontinuation Date	Enter date of discontinuation if units are being discontinued in this run. Defaults to current date
Discontinuation Reason Code)	Select the reason for discontinuation if units are being discontinued in this run.
Reason	Enter, if required, additional reasons for discontinuation.

4.5.9.2 Uploading Unit Attempts

The Bulk Unit Attempt Upload concurrent process provides an interface table that you can use to quickly upload a large number of unit attempts.

You can specify whether unit attempts are unconfirmed or confirmed.

This concurrent process can be used in conjunction with the **Automatically Flag Core/Optional Unit Attempts** profile option. When the profile option is **off**, the unit attempts are simply uploaded.

When the profile option is **on**, the unit attempts are created, based on the pattern of study setup, as **Core**, **Optional**, or **Elective**. If the unit is marked **Core** or **Optional** in the pattern of study, the unit attempt is created accordingly. If the unit is not in the pattern of study, the unit attempt is created as an **Elective**.

For institutions that use a highly structured program mode, a core unit is one that must be completed as part of the program. Optional units may or may not be completed, and elective units are at the student's discretion, as allowed by the institution's policies.

For more information on core, optional, and elective units, see *Oracle Student System Implementation and Administration Guide*.

For more information on the Bulk Unit Attempt Upload concurrent process, see *Oracle Student System Open Interfaces User Guide*.

Prerequisites

Unit attempt data is loaded to interface tables.

Unit sections are offered.

Student program attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Bulk Unit Attempt Upload concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the Bulk Unit Attempt Upload concurrent process parameters.

Table 4–15 Bulk Unit Attempt Upload Parameters

Parameter	Description
Batch Identifier	Select the batch identifier of student unit attempt details uploaded to the interface table. This is a mandatory parameter.
Default Unit Confirmed	Indicates whether the unit attempt should be confirmed or not. This is a mandatory parameter.
Override Enrollment Method	Select an enrollment method if you wish to override the enrollment method defined for the enrollment category.
Deletion Flag	Select Yes/No. Indicates whether successful import is to be deleted or not.

4.5.9.3 Verifying Unit Attempts Against Unit Rules

You run the Bulk Unit Rules Checking Process concurrent process to identify unit attempts that do not meet defined unit version or unit section rules. For example, an educational institution can allow a student to enroll in a unit attempt with a prerequisite on the assumption that the student will satisfy the prerequisite. However, if the student does not satisfy the prerequisite, the deviation from unit rules must be identified.

The Bulk Unit Rules Checking Process concurrent process validates unit rules for each student program attempt in a selected academic period by comparing all enrolled student unit attempts with unit rules and checking whether all invalid

student unit attempts pass the unit rules. Then, the concurrent process updates the unit attempt statuses.

This concurrent process is dependent on the Enrolled Rule Cutoff and the Invalid Rule Cutoff date aliases, that are entered in the Enrollment Calendar Configuration window. For more information on the enrollment calendar, see *Oracle Student System Implementation and Administration Guide*.

When run before the two date alias instances, the concurrent process performs the following tasks:

- If any enrolled student unit attempt fails a unit rule validation, the student unit attempt status is set to **Invalid**, and the change is reported in the exception report.
- If any invalid student unit attempt passes all the unit rule validations, the student unit attempt status is set to **Enrolled**, and the change is reported in the exception report. For subordinate units, the status is not set to **Enrolled** if the superior unit is still in the **Invalid** state.
- If holds against the student program attempt prevent the status from being updated, a message appears in the exception report.

When run after the two date alias instances, no changes are made to the student unit attempt status because the teaching period would already have started. However, all possible changes are reported in the exception report.

The Bulk Unit Rules Checking Process concurrent process is run by an Enrollment specialist nightly during enrollment periods.

The Bulk Unit Rules Check Exception Report should be run along with the Bulk Unit Rules Checking Process concurrent process. The Bulk Unit Rules Check Exception Report concurrent process accesses the log file generated by the Bulk Unit Rules Checking Process concurrent process and generates a report with all the exceptions. For more details, refer to [Viewing the Unit Rules Check Exception Report](#).

Prerequisites

Unit rules are defined.

Enrolled rule cutoff and invalid rule cutoff dates are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Bulk Unit Rules Checking Process concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. Use the following criteria to filter student records to be checked:
 - Program
 - Organizational Unit
 - Term or teaching calendar
- 3. To set the parameters, refer to the following table.

The following table describes the Bulk Unit Rules Checking Process concurrent process parameters.

Table 4–16 Bulk Unit Rules Checking Process Parameters

Parameters	Description
Academic Calendar	Select the academic calendar for which the process is to check unit attempts that do not meet unit rules. This is a mandatory parameter.
Program Code	Select to limit the unit attempt check to a program in the given academic calendar.
Term/Teaching Calendar	Select to limit the unit attempt check to a term or teaching calendar of the given academic calendar.
Organizational Unit	Select to limit the unit attempt check to the organizational unit responsible for the unit in the given academic calendar.
Unit Version Rule	Select the rules, which the process must check.

4.5.9.4 Viewing the Unit Rules Check Exception Report

You run the Bulk Unit Rules Check Exception Report concurrent process to view student unit attempts that failed unit rule validations.

Prerequisites

Bulk Unit Rules Checking Process concurrent process has been run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Bulk Unit Rules Check Exception Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. Enter the unit version rule for which the process is to display program attempts that failed validation.
3. Limit the report by log creation date, organizational unit, location, program, term or teaching calendar, unit set, unit, and unit version.
4. Enter the type or warning message the process must display, if required.
5. To set the parameters, refer to the following table.

The following table describes the Bulk Unit Rules Check Exception Report concurrent process parameters.

Table 4–17 Bulk Unit Rules Check Exception Report Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as a comment on the first day of the report.
Log Creation Date	Select if the log creation date of the previously run Bulk Unit Rules Checking Process is known.
Organizational Unit	Select the organization unit for which the concurrent process is run.
Location	Select the location for which the concurrent process is run.
Program Code	Select the program for which the concurrent process is run.
Warnings Only	Defaults to Only Warning Messages Should be Displayed. You can select to display all messages in the report.
Term/Teaching Calendar	Select the term or teaching calendar for which the concurrent process is run.
Unit Set	Select the unit set for which the concurrent process is run.
Unit Code	Select the unit code for which the concurrent process is run.
Version Number	If you enter a unit code, select the version number.
Unit Version Rule	Select the unit version rule for which the concurrent process is run. This is a mandatory parameter.

4.5.9.5 Running Batch Registration Date Update Process

Educational institutions, especially in the United Kingdom, record registration data for students. It is especially important to capture the date of registration, and confirm any pre-enrolled units attempts.

The educational institution collects registration data from student registration forms. This data includes the date of registration, person number, program code for the student unit attempt, and date of receipt of enrollment form. The information is then uploaded to an interface table and subsequently imported to Oracle Student System.

You can then run the Batch Registration Date Update Process concurrent process to try to confirm unconfirmed unit attempts for inactive or enrolled student program attempts.

When you provide a specific program attempt in the interface table, the unit attempts for that program are confirmed, if possible. If no program attempt information is entered in the interface table, then all unit attempts for all programs are confirmed. For each unit attempt, the concurrent process changes the status of unconfirmed units to **Enrolled**, and updates the registration date as the enrollment date. When an unconfirmed unit attempt is confirmed against an inactive program attempt, the program attempt is updated to **Enrolled** based on the program attempt status derivation logic.

A subordinate unit will not be confirmed unless a superior unit is confirmed.

On successfully updating the unit attempts, the concurrent process updates the registration date as the enrollment form received due date and deletes the records from the interface table.

This process returns an error if the student has no inactive or enrolled program attempts. This process is usually run after the Batch Pre-enrollment Process.

For more information on the Batch Registration Update concurrent process, see *Oracle Student System Open Interfaces User Guide*.

Prerequisites

Registration data from student registration forms is loaded to interface tables.

The enrollment calendar is set up. The enrollment record will not be updated with the enrollment form received due date unless the enrollment calendar for which the update applies has start and end dates that fall within the academic year.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Batch Registration Date Update Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Batch Registration Date Update Process concurrent process parameters.

Table 4–18 Batch Registration Date Update Process Parameters

Parameter	Description
Batch ID	Select the batch identifier for student registration details uploaded to the interface table, that is to be used to update student program and unit attempts in Oracle Student System. This is a mandatory parameter.
Enrollment Method Type	Select the enrollment method used for the batch. This is a mandatory parameter.

4.5.9.6 Viewing the Batch Registration Update Exception Report

You run the Batch Registration Date Update Process Exception Report concurrent process to view an exception report that lists student records that are not uploaded into the Oracle Student System table.

Prerequisites

Batch Registration Date Update Process concurrent process has been run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Batch Registration Date Update Process Exception Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. Enter the batch ID of the group of records uploaded to the interface table and used to update student program and unit attempts in Oracle Student System.

4.5.10 Discontinuing Unit Attempts

Both administrators and students can discontinue units either in self-service or through a concurrent process.

A unit attempt is dropped or discontinued based on the unit discontinuation dates and administrative unit statuses defined by the educational institution. Dropped unit attempts are not considered by other subsystems in Oracle student System.

Discontinued unit attempts have an administrative unit status associated with them and may be assigned a grade, based on setup. Typically, the discontinued status is used as a student's withdrawal from the unit attempt falls later in the term. Institutions can set up increasing levels of consequences for withdrawals from unit attempts as the term progresses.

The institution must set up the time frame in which unit attempts are considered dropped or discontinued. The educational institution must also determine whether or not a discontinued unit attempt counts towards the student's load or not.

A dropped unit attempt cannot be reinstated. However, administrators can reinstate a discontinued unit attempt in self-service.

When a superior unit section is dropped or discontinued, the subordinate unit sections are automatically dropped or discontinued.

While discontinuing unit attempts, you may perform the following tasks:

- [Discontinuing Unit Attempts](#)
- [Discontinuing Students with Failed Unit Rules](#)

4.5.10.1 Discontinuing Unit Attempts

To discontinue unit attempts, you can use self-service or a concurrent process in the back-office application.

If an administrator discontinues unit attempts, a business event is raised that notifies the student about the discontinued units along with the reason for discontinuation. A business event is also raised when the student discontinues a unit.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

In self-service, navigate to the My Schedule page, select the unit, and then click the Drop button in the My Schedule page. To prevent students from dropping core units, you can set the enrollment category validation step, Allow Drop of Core Unit Attempt to **Warn** or **Deny**. For more information on this enrollment category step, see *Oracle Student System Implementation and Administration Guide*.

You run the Bulk Unit Enrollment/Discontinuation concurrent process to automatically discontinue unit and program attempts.

For more information, refer to [Running Bulk Unit Enrollment/Discontinuation Process](#).

Additional Notes

Enter the term calendar, enrollment method, program, and unit to be discontinued. Set the report level to display only errors, errors with warnings, or errors with warnings and information.

You can use this process to discontinue a single student by person number, a group of students by person ID group, or all students for the specified unit. You can discontinue a student or students for a specified unit or a unit class by entering the relevant parameters.

4.5.10.2 Discontinuing Students with Failed Unit Rules

In the Invalid Unit Attempts window, you can search for students who do not satisfy unit rules for a specific term. The window displays the list of students who do not satisfy rules for the enrolled unit attempts for a specific teaching period.

You can discontinue students who do not meet rules from the associated unit attempts. You can choose to discontinue either specific students or all students.

Prerequisites

Invalid unit attempts exist.

Navigation

Enrollments > Processes > Invalid Unit Attempts

Steps

1. Query the appropriate term or teaching calendar in the Invalid Unit Attempts window. Details of the unit, unit rule failed, program, unit section, and location for each student are displayed.
2. Select the Drop/Discontinue check box for students whose unit attempts you want to discontinue in the Invalid Unit Attempts window.
3. Click **Submit** to commit the details and save your work.

4.5.11 Transferring Unit Sections

A set of students can be transferred between unit sections within the same unit by running a concurrent process. On successful transfer of a unit section, a notification is sent to students about the transfer.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For more information on creating workflows for business events, see *Oracle Workflow User's Guide*.

This section contains the following tasks:

- [Running Bulk Unit Section Transfer](#)
- [Running Bulk Unit Section Transfer with Log Creation Date](#)

4.5.11.1 Running Bulk Unit Section Transfer

The Bulk Unit Section Transfer concurrent process transfers a set of students between unit sections of the same unit. This concurrent process performs one of the following tasks:

- Changes the unit version in which students have unit attempts **or**
- Changes unit section attributes of student unit attempts to the attributes of another unit section. Transfers are from specified unit sections to a single unit section for a group of students specified by the parameters.

After a student unit attempt is changed to a new unit section, a history of the change is entered. For details on viewing student unit attempt history, refer to [Viewing Student Unit Attempt History](#).

For a teaching period, the concurrent process first checks whether there is a term record associated with the load calendar. If yes, then values from the term record are used to select students and perform validations.

The Bulk Unit Section Transfer concurrent process is run in immediate mode or as a scheduled request by an Enrollment specialist as required.

The Bulk Unit Section Transfer concurrent process produces the Bulk Unit Section Transfer exception report listing results, errors, and warnings.

Prerequisites

Refer to [Prerequisites](#) for [Transferring Program, Unit, and Unit Set Attempts](#).

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Bulk Unit Section Transfer concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Bulk Unit Section Transfer concurrent process parameters.

Table 4–19 Bulk Unit Section Transfer Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.
Report Level	Select the level of detail in running of concurrent process and in exception reports. Defaults to Errors.
Teaching Period	Select the teaching period from which student program attempts are selected for transfer. This is a mandatory parameter.
Program Code	Select the program to select the students to be transferred.
Location	If defined, students enrolled in this location will be selected for the transfer.
Attendance Mode	If defined, students enrolled in this attendance mode will be selected for the transfer.

Table 4–19 (Cont.) Bulk Unit Section Transfer Parameters

Parameter	Description
Attendance Type	If defined, students enrolled in this attendance type will be selected for the transfer.
Person ID Group	Select the person ID group.
Unit Code	If defined, students enrolled in this unit code will be selected for the transfer. This is a mandatory parameter.
Version Number	Select the unit version number. This is a mandatory parameter.
Unit Location Code	If defined, students enrolled in this unit class will be selected for the transfer.
Student Unit Class	If you entered the location above, select the class for the unit.
Unit Attempt Status 1	Select the unit attempt status. You can select up to three unit attempt statuses.
New Unit Version Number	Select a new unit version number. This is entered only when student unit attempts are transferred between different unit versions.
New Unit Location Code	Select the new location code of student unit attempts created by this concurrent process. If this parameter is not entered, each new student unit attempt has the same unit location code as the unit attempt it replaces.
Unit Class	Select a new location, you can also select a unit class of student unit attempts created by this concurrent process. If this parameter is not entered, each new student unit attempt has the same unit class as the unit attempt it replaces.
Enforce Validation	Select Yes to enforce level of validations. This is a mandatory parameter.
Enrollment Method	Select the enrollment method. This is a mandatory parameter.
Reason	Enter the reason for the transfer.

Validations

This concurrent process performs several validations before, during, and after the transfer.

Before the transfer:

- Checks that a student is not enrolled in the destination unit section.
- Checks that the destination unit section is offered in the designated teaching period.
- Checks that the student is not excluded from the destination unit section because of holds. If a student has a hold that prevents enrollment to a superior or subordinate unit section, then the unit section will not be transferred.
- Checks that the student has not satisfied destination unit section requirements through advanced standing. If a unit section with advanced standing is either a superior or subordinate unit section, then the transfer will fail.
- Checks that the student is not intermitted during the teaching period of the destination unit section.
- Checks that the student's grading schema exists in destination unit section.
- Checks that student can be enrolled in the same number of credit points in the destination unit section. If the destination unit section has variable credit points, the student is enrolled in the same number of credit points as in the original unit section. If the student cannot enroll in the same number of credit points, then enrollment is not performed.
- Checks that student is still enrolled in a co-requisite for the destination unit section.
- Checks that the destination unit section is not incompatible with other unit attempts.
- Checks for reserved seats in destination unit section.
- Checks whether destination unit section requires special permission and whether student has special permission granted.
- Checks whether destination unit section causes time conflict.

If any of the above validations are failed, the student is not enrolled in the destination unit section.

During the transfer:

- Checks to see that enrollment in the destination unit does not violate the maximum enrollment limits for the destination unit section. If there are more students than the maximum limit, then some students are enrolled up to the maximum allowed, based on the time/date stamp of their enrollment in the original unit section. After the destination unit section reaches the maximum limit, any remaining students can be waitlisted.

After the transfer:

- Checks that the destination unit section does not violate any minimum or maximum credit point restrictions for the student program attempt.
- Checks that unit version rules are not violated.
- Checks that unit repeat conditions are not violated.

If any of the above validations are failed, the transfer is rolled back.

Further, the process proceeds to perform the following checks:

- Forced location violations
- Forced attendance violations
- Cross-element violations
- Exam locations in original and destination unit sections mismatch

If any of the above validations are breached, the enrollment is allowed but errors are reported.

If the original unit section is superior, the destination unit section must also be a superior unit section or a section that is not a subordinate section. After the concurrent process enrolls the student to a destination unit section, it drops all related subordinate unit sections.

If the new superior unit section's relationship has subordinate unit sections marked as Default Enroll, then the concurrent process enrolls the students into those subordinate unit sections.

There might be situations where no validations are required for a unit section transfer, such as those arising from an instructor unable to take classes. In such cases, educational institutions can choose not to enforce all the validations.

If the institution specifies that validations are not to be enforced, the concurrent process performs the following tasks:

Before the transfer:

- Checks whether the student is not already enrolled in the destination unit.
- Checks whether the destination unit is offered in the designated teaching period.
- Checks whether the student's grading schema exists in the destination unit.

During the transfer:

The concurrent process enrolls the student into the same number of credit points as the student had in the original unit section.

If any of these validations fail, the transfer is rolled back.

4.5.11.2 Running Bulk Unit Section Transfer with Log Creation Date

Run the Bulk Unit Section Transfer with Log Creation Date concurrent process to view unit sections transferred through the Bulk Unit Section Transfer concurrent process.

If known, you need to enter the date on which the Bulk Unit Section Transfer concurrent process was run or enter a combination of parameters including teaching period, program code, location code, attendance mode and type, person ID group, and unit attempt statuses.

Prerequisites

The Bulk Unit Section Transfer concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Bulk Unit Section Transfer with Log Creation Date concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. If known, select the date on which the Bulk Unit Section Transfer was run and the log created.
3. If the log creation date is not known, enter the academic period and a combination of the parameters available.
4. Enter the parameters.

The parameters for the Bulk Unit Section Transfer with Log Creation Date concurrent process are similar to Bulk Unit Section Transfer concurrent process. For parameter-related information, refer to [Running Bulk Unit Section Transfer](#).

The only additional parameter is Select Either Previous Log. Select a log creation date of the previously run Bulk Program Offering Transfer Process concurrent process, that you want to view.

4.5.12 Overriding Existing Validations

Administrators must set up enrollment validations for a specific term or teaching calendar that determine whether a student is eligible for enrollment. These validations are specified as part of the enrollment category. The student must pass these validations in order to successfully enroll to units.

Validations include forced full time attendance and minimum and maximum credit points required allowed for a program. Administrators can also set up special enrollment validations for a group of students defined by person ID group or enrollment category.

For more information on validations, see *Oracle Student System Implementation and Administration Guide*.

If necessary, administrators can override validations, enrollment steps, and holds. You can override validations by performing the following tasks:

- [Running Enrollment Eligibility Override Batch Process](#)
- [Managing Individual Overrides](#)

4.5.12.1 Running Enrollment Eligibility Override Batch Process

Run the Enrollment Eligibility Override Batch Process concurrent process to override person, program, and unit enrollment steps specified as part of enrollment validations. To run this process, you have to enter a combination of both the term and teaching period.

Oracle Student System uses term details, if available for the parameters specified. If term details are not available, program attempt details are considered. Once students are identified, specify the override for the steps or credit point limits of each of the units or unit sections.

Prerequisites

Person, program, and unit eligibility steps are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Enrollment Eligibility Override Batch Process concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. Select a calendar for which the overrides are applicable.
3. Select the person ID group or group of students for whom the override is applicable.
4. Specify the override for steps related to person, program, or unit.
5. Specify the credit point limits, as applicable. Select the program steps of Final Minimum Credit or Final Maximum Credit, or the unit step of Variable Credit Point Approval to enter new override credit points. The system ignores any data entered in the override credit points fields if other program or unit steps are chosen.
6. To set the parameters, refer to the following table.

The following table describes the Enrollment Eligibility Override Batch Process concurrent process parameters.

Table 4–20 Enrollment Eligibility Override Batch Process Parameters

Parameter	Description
Calendar	Select the term and teaching calendar in which you can select person or program eligibility criteria that you want to override. This is a mandatory parameter.
Program Code	Select a program to select all students enrolled in that program.
Location Code	Select a location to select all students enrolled in that location.
Attendance Mode	Select an attendance mode to enroll all students enrolled in that attendance mode.
Attendance Type	Select an attendance type to enroll all students enrolled in that attendance type.
Enrolled in Unit Code	Select to override eligibility criteria for students by the unit in which they are enrolled.

Table 4–20 (Cont.) Enrollment Eligibility Override Batch Process Parameters

Parameter	Description
Enrolled in Unit Set Code	Select to override eligibility criteria for students by the unit set in which they are enrolled.
Organizational Unit	Select to override eligibility criteria for students by the organizational unit responsible for the program.
Person ID Group	Select the person ID group of the students on which the process will apply the eligibility overrides.
Person Number	Select a person number of the given person ID group on which the process will apply the eligibility overrides. You can only enter a person number if you have entered a person ID group.
Program Attempt Status	Select by program attempt status of completed, deleted, discontinued, enrolled, inactive, intermitted, lapsed, or unconfirmed, the students on whom the process will apply the eligibility overrides.
Person Step 1	Select one of the person-level validations set up in the Enrollment Process Category Details window that you want the process to override. It may be the status of admission, continuing, intermission, timeslot, post admission, or visa.
Program Step 1	Select one of the program-level validations set up in the Enrollment Process Category Details window that you want the process to override. It may be cross-faculty credit points, cross-location credit points, cross-mode credit points, final maximum credit, final minimum credit, forced attendance type, program time conflict, or unit exclusion.
Desired Credit Point Limit	If you choose to override the program-level validation of final maximum or minimum credit, enter the override value.
Unit Step 1	Select one of the unit-level validations set up in the Enrollment Process Category Details window that you want the process to override. This could be corequisite, pre-requisite, audit limit, audit permission, special permission, reserved seat, cart maximum, incompatible, forced location, forced attendance mode, time conflict, intermission status, of a translation set, repeat, re-enrollment, enrollment method, or visa status.
Unit Code	Select the unit for which the process will override the person, program, and unit validations given above.
Unit Section	Select the class of the unit given above, for which the process will override the person, program, and unit validations given above. You can select a unit section only if you have entered a unit code.

Table 4–20 (Cont.) Enrollment Eligibility Override Batch Process Parameters

Parameter	Description
Person Override Step 1	You can choose to override one of the system validations done at the person level. These are check holds and override variation cutoff.
Unit Override Step 1	You can also choose to override one of the system validations done at the unit level. These are closed section override, override waitlist maximum, and variable credit approval.
Number of Approved Credit Points 1	If you choose to override the system unit validation of variable credit approval, enter the override value.
Person Step 2	Select the second person-level validation from those set up in the Enrollment Category Details window that you want the process to override. You can select up to four user-defined and system-defined validations at each level to be applied to the same unit or to four different units.
Authorization Code	Select the code for the SEVIS person type authorized to perform override.
Authorization Comments	Enter free format text as important additional information on the authorization of the override.

4.5.12.2 Managing Individual Overrides

You can use the Student Enrollment Overrides window to override validations for individual students. Validations can be overridden at the Person, Program, and Unit level for steps defined as part of the enrollment category and method. They can also be overridden for *system validations*. System validations can be added at the program or unit level. Examples include checking holds, variable credit approvals, and options to override the maximum waitlist allowed for a unit.

For overrides on unit type steps, you can specify the version details of the unit which will be effected. Administrators can also grant an override for students to be able to drop a core unit attempt in self-service.

For program type overrides, if you are overriding the final minimum or maximum credit points for a program, you can enter a desired credit point limit.

Prerequisites

Enrollment categories and methods are defined.

Navigation

Enrollments > Student Enrollment Overrides

Steps

1. Query the appropriate student record.
2. Select a step type depending on whether you want to override Person, Program, or Unit.
3. Select a validation step from the Step list of values.

The Date Approved field defaults to the current date. This date can be overridden.

4. Save your work.

4.5.13 Managing Administrative Holds

Holds restrict student access to services offered by the educational institution such as issuing transcripts or enrollment to program attempts. Holds are of two types, *academic* and *administrative*. Academic holds are applied when a student's academic progress does not meet program or unit requirements. Administrative holds are applied when a student fails to meet administrative requirements, such as paying fees.

In Enrollment, administrators can choose to either release a hold for a program or override a hold for the current teaching period. When you release a hold, its effect on the student is removed and is not considered again. You can specify the start and end dates for which such a release is valid. When you override a hold, the hold effect remains but you can specify a period for the override. An overridden hold is not considered for the duration of the override.

Administrators release administrative holds in the Person Holds or Holds Override or Release windows. Academic holds and administrative holds placed in the Progression subsystem are released in the same subsystem. For more information on academic and administrative holds, see *Oracle Student System Implementation and Administration Guide*.

You can also override holds placed by external systems other than Oracle Student System. You cannot, however, release a hold placed by an external system. For more information on external holds, see *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Holds for students and programs are defined.

Navigation

Enrollments > Holds Override or Release

Steps

1. Query the appropriate student record.
2. Select the administrative holds to be overridden or released.

For an external hold, the Release radio button is disabled, and the Override radio button is selected by default.

3. Save your work.

4.5.14 Enrolling Waitlisted Students

Educational institutions can *waitlist* students if enrollment in a unit section is full, and enroll students later if a vacancy arises or if there is an increase in class size. Students can be waitlisted either on a first in/first out basis or according to the priorities and preferences defined. You can also define the maximum number of students for a waitlist.

Oracle Student System assigns sequential position numbers to waitlisted students. The application can be set up so that waitlisted students are automatically enrolled when a seat becomes available or when the enrollment limits for the unit section are increased. Students can also be enrolled using a concurrent process. The system can also be configured so that the automatic move from waitlist to enrolled does not happen.

If an enrolled student drops a class, the first waitlisted student moves from waitlisted to enrolled. If the enrollment limits are increased in the Program Structure and Planning subsystem, then students move from the waitlist to enrolled, up to the total number of seats added when the system is configured to support automatic enrollment.

Enrollment occurs only if students pass all configured validations. Oracle Student System notifies administrators about waitlisted students who failed enrollment validations. Administrators can also run a concurrent process to enroll waitlisted students into unit sections with holds, one unit section at a time.

Administrators can reposition waitlisted students, and in self-service, view a student's waitlist position against the total number of students waitlisted. Students can use self-service to view their position in the waitlist for a unit. This position is displayed in the student's schedule.

Enrolling waitlisted students consists of the following tasks:

- [Repositioning Students in a Waitlist](#)
- [Viewing Unit Sections with Holds and Waitlisted Students](#)
- [Running Enroll Students from Waitlist Process](#)

4.5.14.1 Repositioning Students in a Waitlist

Use the Unit Section Waitlist window to manually change student position in a waitlist.

If administrators alter position numbers, Oracle Student System updates the position numbers displayed in the schedule, in self-service, and automatically resequences other waitlisted students.

Prerequisites

Waitlisting and waitlist options are enabled.

Navigation

Enrollments > Unit Section Waitlist

Steps

1. Query the appropriate unit section using the Unit Code field.
2. In the Position field, enter a new waitlist position for the student.
3. Save your work

4.5.14.2 Viewing Unit Sections with Holds and Waitlisted Students

You run the List of Unit Section with Hold Status and Waitlisted Students concurrent process to view waitlisted students and hold status, if any, for unit sections in a given calendar type.

Prerequisites

Waitlisting and waitlist options are enabled.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the List of Unit Section with Hold Status and Waitlisted Students concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. Select a calendar type to limit by term calendar, the report on unit sections with hold status and waitlisted students.

4.5.14.3 Running Enroll Students from Waitlist Process

You can run the Enroll Students From Waitlist Process concurrent process to enroll waitlisted students in unit sections, one unit section at a time.

Prerequisites

Waitlisting and waitlist options are enabled.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Enroll Students from Waitlist concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#)

2. Select the unit section in which the unit section must enroll any waitlisted students. This includes details such as campus, version, calendar type, and unit class. Only unit sections with a system status of **Hold** are displayed. These are unit sections that have open seats and students on the waitlist. This is a mandatory parameter.

4.5.15 Managing Timeslots

Timeslots are created for terms and teaching periods. Administrators can assign students to timeslots randomly or by priority first and then by preferences. The order of priority can be organizational unit, person ID groups, and program type. The order of preference for a program type can be associate degree, bachelors

degree, and doctoral degree. Priorities and preferences for timeslots are specified during setup. For more information, see *Oracle Student System Implementation and Administration Guide*.

A timeslot has a start and end date. Each day within a timeslot, students can enroll through self-service during a certain time period. You can specify the number of students who can enroll during a particular timeslot and therefore control the time period during which students enroll.

Managing timeslots includes the following tasks:

- [Assigning Students to Timeslots](#)
- [Viewing Timeslot Details](#)
- [Modifying Timeslot Details](#)
- [Viewing Student Timeslot Details](#)

A timeslot session contains many timeslots, defined for different program types.

4.5.15.1 Assigning Students to Timeslots

The Assign Enrollment Timeslot window combines a timeslot calculator and a concurrent process. Using this window, you can specify the students to be selected for appointment, the timeslot to which they are to be assigned, the daily start and end time for enrollment, the appointment duration in minutes, and the maximum number of students to be assigned to each timeslot appointment.

Once these details are specified and calculated, you can submit the concurrent process request.

Administrators can generate timeslots in trial or final mode for a given program type group. The concurrent process can be run an unlimited number of times in trial mode. The trial mode displays timeslot details that would be produced when generated in the final mode. These results can be changed before submitting and running the process in final mode. Oracle Student System calculates the number of timeslots generated for a session and the total number of students assigned to a timeslot. Administrators can manually override these numbers.

For more information on making changes to timeslots, refer to [Modifying Timeslot Details](#).

When you assign timeslots, they are validated against the student's current schedule of units and ensure that a student's assigned timeslot does not conflict with a current enrollment. Holds are validated during enrollment activity rather than at the time of assigning timeslots.

Prerequisites

Timeslot names and periods are defined.

Program type groups, calendars, and student types are defined.

Navigation

Enrollments > Processes > Assign Enrollments Session Timeslots

Steps

1. Query the program type group.
2. Select a timeslot from the Timeslot list of values. The start and end dates of the timeslot are populated automatically. The current date must be less than the timeslot end date.
3. Select a value from the Length of Time list of values to specify the duration of each timeslot.
4. Specify a start and end time for the timeslot to be active.
5. Click **Calculate** to calculate and display the number of students allotted to a timeslot and the number of timeslot durations in the timeslot session.
6. To override maximum head count displayed for the timeslot, enter a new value in the Maximum Head Count Per Length of Time field.
7. Save your work.
8. Select Trial and click **Submit** to view timeslot details and alter if required.
9. Alternatively, select Final and click **Submit** to generate final timeslots.

4.5.15.2 Viewing Timeslot Details

To view timeslot details, use the Timeslot Assignment Results window. You can query the appropriate program type group to view *generated* and *to be generated* timeslot details and students assigned and unassigned to a timeslot. For this window, the administrator has no privileges and can only view timeslot assignments details.

For each combination of Program Type Group, Student Type, Teaching Period, and Timeslot, you can choose to view trial or final mode timeslot assignments. The results are sorted by start date and start time.

You can view students who were eligible for timeslot assignments, but were not assigned a timeslot. This would occur if you specify parameter values which result in more students being selected than the available timeslots assignments.

Prerequisites

Timeslots are assigned.

Navigation

Enrollments > Processes > Timeslot Assignments Results

Steps

1. Query the program type group to view generated timeslot details.
2. Select options to view either assigned or unassigned students, or both by using the Assigned, Unassigned, and All check boxes.

4.5.15.3 Modifying Timeslot Details

Administrators can change timeslot duration details of a student before generating timeslots in the final mode. Use the Timeslot Assignment Results - Admin window to modify timeslot details and add or remove students assigned to a timeslot.

Administrators review timeslot details and can add students not originally assigned a timeslot, but subsequently found eligible for enrollment. Similarly, students subsequently found not eligible for enrollment can be removed from the assigned timeslot.

Prerequisites

Timeslots are assigned.

Navigation

Enrollments > Processes > Timeslot Assignment Results - Admin

Steps

1. Query the appropriate program type and add or delete students from the timeslot.
2. Save your work.

4.5.15.4 Viewing Student Timeslot Details

Use the Review Student Timeslot Assignments window to view timeslot assignments for an individual student. Administrators can override a timeslot assignment and enter a new timeslot for a student.

The information in this window appears in self-service enrollment applications only if the timeslot has been generated in final mode.

Prerequisites

Timeslots are assigned.

Navigation

Enrollments > Processes > Review Student Timeslot Assignments

Additional Notes

Query the appropriate student to view timeslot details of the student.

4.5.16 Viewing Students with Failed Minimum Credit Points

Each unit section has associated minimum and maximum credit point requirements. It is important that students meet the minimum credit point requirements to be enrolled in a unit section.

The Final Minimum Credit enrollment validation step can be set either to issue a warning or deny enrollment. There might be situations where this step is first set to **Warn** and later changed to **Deny**, as per institutional policy.

In such cases, some students might be only issued a warning when they first enroll in a unit section. Later when the step is changed to **Deny**, these students would not meet enrollment eligibility requirements.

Use the Minimum Credit Point Query window to identify the students who do not meet the minimum credit point requirements. You can also notify students that they do not meet requirements and need to increase their credit points to the required level.

You can filter the query results on the basis of program location, attendance type, or attendance mode information. The query returns a list of all students matching the specified criteria whose enrolled credit points fall below the minimum requirements.

Prerequisites

Minimum and maximum credit points are defined as validation steps.

Authorization code is defined for minimum credit points.

Navigation

Enrollments > Processes > Minimum Credit Point Query

Steps

1. Query for the program code, term, and enrollment method type to view the students who failed the minimum credit point validation.
2. Enter a criterion to filter the records. The criterion can be program location, attendance type, or attendance mode.
3. Click **Retrieve List** to populate the **Student Credit Point Enrollment** region.
4. Click **Download Records** to download the records to download the information as a separate file.
5. Select Notify to enable the sending of notification to the student if the minimum credit point validation fails.
6. Click **Send Notification** to launch a workflow event to notify the student of failure in minimum credit point validation.

4.5.17 Using National Student Clearinghouse Snapshots

The National Student Clearinghouse (NSC) is a non-profit organization that help in student loan programs for schools in the United States. The National Student Clearinghouse collects data to identify the following:

- Students who withdraw from school and need to begin repayment of student loans
- Students who transfer from one school to another
- Students who return to school and may be eligible for deferment of repaying student loans
- Students who continue school and are eligible for deferment of repaying student loans

Using National Student Clearinghouse snapshots consists of the following tasks:

- [Creating Enrollment Data Snapshots](#)

- [Deleting Enrollment Data Snapshots](#)
- [Printing Enrollment Data Snapshots](#)

4.5.17.1 Creating Enrollment Data Snapshots

Run the National Student Clearinghouse Snapshot Creation Process concurrent process to create snapshots of student enrollment data. This concurrent process collects information required to confirm the enrollment status of student financial aid recipients.

The snapshot generated by the concurrent processes can be created, deleted, or used to create a text file. Once the file is created, the educational institution is responsible for transporting the file to NSC.

The setup for the National Student Clearinghouse concurrent processes is completed in the National Student Clearinghouse Configuration window. For more information, see *Oracle Student System Implementation and Administration Guide*.

Prerequisites

- Citizenship/Residence status is specified in the Residency/Citizenship Details window.
- Non-Citizen Status Code is specified.
- An active SSN is defined for the person.
- At least one unit attempt with a teaching period that falls in the given term calendar exists.
- An active program attempt exists.
- The institution code of the owner organizational unit of the program is the same as the school code.
- The owner organizational unit of the program should be a child organization under the local institution, excluding the organizations which have a branch code defined in the Organization Alternate IDs window.

If the reporting flag is set to Non-standard report, then in addition to the aforementioned, the following prerequisites hold good:

- A completed program attempt exists.
- Date graduated is defined.
- If the date graduated is Conferral, then the conferral date in graduand details should be between the term start and end dates.

- If the date graduated is Course Requirements Completion Date, then the course requirement completion date should be between the term start and end dates.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the National Student Clearinghouse Snapshot Creation Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the National Student Clearinghouse Snapshot Creation Process concurrent process parameters.

Table 4–21 National Student Clearinghouse Snapshot Creation Process Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.
School Code	Select the educational institution alternative ID of the school that the report must process for student loan programs.
Branch Code	Select the responsible organizational unit alternate ID in the school which is to be considered by the process.
Term	Select the academic term for which the student snapshot will be created in order to retrieve program attempt information.
Standard Reporting Flag	Select a report flag. Options are standard, non-standard, or regenerated.
Non-Standard Report Type	If you selected a non-standard report above, you must select the appropriate report type for it.
Previous Run Snapshot	Select a previously created snapshot. The process then compares the current snapshot with the previous snapshot. If this field is blank, the current snapshot is marked as the first run of the term.

Table 4–21 (Cont.) National Student Clearinghouse Snapshot Creation Process

Parameter	Description
Output Directory	Enter the path and the directory in which the process must file the output. This is a mandatory parameter.
File Name	Enter the name for the output file that the process will generate. This is a mandatory parameter.

4.5.17.2 Deleting Enrollment Data Snapshots

Run the National Student Clearinghouse Snapshot Deletion concurrent process to delete the snapshot and all attributes for the snapshot.

Prerequisites

Refer to [Prerequisites](#) for [Creating Enrollment Data Snapshots](#).

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the National Student Clearinghouse Snapshot Deletion Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the National Student Clearinghouse Snapshot Deletion Process concurrent process parameters.

Table 4–22 National Student Clearinghouse Snapshot Deletion Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.
Snapshot File	Enter the name of the output file you specified when you ran the National Student Clearinghouse Snapshot Creation Process.

4.5.17.3 Printing Enrollment Data Snapshots

Run the National Student Clearinghouse Snapshot Printing Process concurrent process to create a text file for the specified snapshot. Users must open the text file for output.

Prerequisites

Refer to [Prerequisites](#) for [Creating Enrollment Data Snapshots](#).

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the National Student Clearinghouse Snapshot Deletion Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, refer to the following table.

The following table describes the National Student Clearinghouse Snapshot Deletion Process concurrent process parameters.

Table 4–23 National Student Clearinghouse Snapshot Printing Process Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.
Snapshot File	Enter the name of the snapshot file created that this process will convert to a text file. This is a mandatory parameter.
Output Directory	Enter the path and the name of the directory in which the created snapshot file is stored. This is a mandatory parameter.
File Name	You must enter the name of the text file that the process will generate. This is a mandatory parameter.

4.5.18 Viewing Student Program and Unit Attempt History

A student program attempt or unit attempt might undergo several changes during the course of the student's study period. For example, a student might change the location opted for during the course of his progress in the program attempt or discontinue from a program attempt. Using history windows, administrators can view information that has changed through the course of a student's tenure at the university.

You can view the history of changes made to student program and unit attempts by the following tasks:

- [Viewing Program Attempt History](#)
- [Viewing Student Unit Set Attempt History](#)
- [Viewing Student Unit Attempt History](#)
- [Viewing Student Program Attempt Award History](#)

4.5.18.1 Viewing Program Attempt History

To view the history of changes to a student program attempt, use the Student Program Attempt History window. You can view information related to the following:

- Program: Version number, attendance mode, and type
- Career Details: Key program, catalog, and primary program type details
- Status and location: Program attempt status, progression status, location code, and exam location code
- Category details: Fee, correspondence information, and funding source
- Completion details: Derived completion details, completed source, completed date for program requirements, nominated completion year and period, manual override completion date, derived completion date discontinuation details
- Other Details: Override time limitation, waive option, and rule check

Prerequisites

Student program attempts exist.

Navigation

Requests > Enrollments History > Student Program Attempt

Steps

1. Query the appropriate record using the Find Student Unit Attempts window. The history details appear in reverse chronological order.
2. Click an appropriate tab to view associated details.

4.5.18.2 Viewing Student Unit Set Attempt History

To view the history of changes to a student unit set attempt, use the Student Unit Set Attempt History window.

The Student Unit Set Attempt History region includes information related to confirmation, voluntary ending, parent unit set, and authorization.

Prerequisites

Student unit set attempts exist

Navigation

Requests > Enrollments History > Student Unit Set Attempt

Steps

1. Query the appropriate record using the Find Student Unit Attempts window. The history details appear in reverse chronological order.
2. Click an appropriate tab to view associated details.

4.5.18.3 Viewing Student Unit Attempt History

To view the history of changes to a student unit attempt, use the Student Unit Attempt History window.

The Student Unit Attempt History region displays information under the following tabs:

- Unit Section: History details of individual unit sections for a program attempt, such as location, class, enrolled date, and core indicator
- Assessment: Examination location details for unit sections
- Waive Rule: Waive rules and superior unit information
- Discontinuation: Discontinuation dates, administrative unit statuses, and reason for dropped unit attempts

- Enrollment: Enrollment method type, grading schema code, and enrolled credit points
- Override: Information regarding overrides to enrollment credit points, effective full time student units, and achievable credit points
- Other Details: Reason for credit point override, date on which history ends, and the author

Prerequisites

Student unit attempts exist.

Navigation

Requests > Enrollments History > Student Unit Attempt

Steps

1. Query the appropriate record using the Find Student Unit Attempts window. The history details appear in reverse chronological order.
2. Click an appropriate tab to view associated details.

4.5.18.4 Viewing Student Program Attempt Award History

Use the Student Program Attempt Award History window to view all awards that a student has completed in the program attempt and track award aim history.

Prerequisites

Program attempts with award aims exist.

Navigation

Enrollments > Processes > Student Program Attempt Award History

Additional Notes

In the Find Student Program Attempt Awards window, query for a student, program code, and award aim. The history details appear in reverse chronological order, in the Student Program Attempt Award History window.

You can also query the student information directly in the Student Program Attempt Award History window.

4.5.19 Generating Enrollment Statistics

After enrolling students and while students are pursuing their programs, administrators can generate various reports on program and unit enrollments, names of students enrolled, the number of students in a program or unit offering option, and the number of student unit attempts. Administrators can also view class lists that name the students enrolled in a unit section.

Administrators can also view students who had dropped below the full load at a certain point of time and who have now returned to full load in the current term or in a specific calendar. For more information on full load, see *Oracle Student System Implementation and Administration Guide*.

While generate enrollment statistics, you can perform the following tasks:

- [Listing Number of Units Attempted by Students](#)
- [Viewing List of Student Names and Program Details](#)
- [Viewing List of Current Enrollment Details](#)
- [Viewing Program Attendance Summary](#)
- [Viewing Student List-Unit](#)
- [Viewing List of Students below Full Time Load](#)
- [Downloading a Class List](#)
- [Viewing Statistical Details](#)

4.5.19.1 Listing Number of Units Attempted by Students

You run the Unit Enrollment Summary concurrent process to generate a report that lists the number of student unit attempts. The report can also be set to consider students with specific unit attempt statuses in a given unit offering or set of unit offerings. The concurrent process can be run for all students in particular units or a particular subset of students, such as students at a given location. The concurrent process results can be set to be summarized by attendance type.

Prerequisites

Enrolled unit attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Unit Enrollment Summary concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. Enter the load calendar to be considered.
3. You can limit the report to a maximum of five units and four unit attempt statuses.
4. Optionally, enter the organization, location, or class that the process must consider for the specified load calendar.
5. To set the parameters, refer to the following table.

The following table describes the Unit Enrollment Summary concurrent process parameters.

Table 4–24 Unit Enrollment Summary Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as a comment on the first page of the report.
Unit Code1	Select the first unit for which the process must report the number of students enrolled in the given load calendar. You can choose to run the process for up to five units.
Load Calendar	Select the load calendar for which the report is to be generated. This is a mandatory parameter.
Organizational Unit	Select an organization unit to limit the report to a specific organization.
Location	Select the campus or study center that the educational institution conducts business or holds classes in to limit the report to that location.
Unit Class	Select a unit class to limit the report to that unit class.
Unit Attempt Status 1	Select a system-defined status of the unit attempt. These are completed, discontinued, dropped, duplicate, enrolled, invalid, unconfirmed, or waitlisted. You can choose to limit the report to up to four different system-defined unit attempt statuses.

Table 4–24 (Cont.) Unit Enrollment Summary Parameters

Parameter	Description
Attendance Type	Select an attendance type, such as full time or part time, to limit the report to that attendance type. If term records exist, values from the term record are used for processing.
Start Type	Select a student type, such as new or returning to limit the report data.
Unit Coordinator Person Number	Select a unit coordinator. A unit co-ordinator may co-ordinate more than one unit.

4.5.19.2 Viewing List of Student Names and Program Details

You run the Student List concurrent process to generate a report that lists student names and their enrolled program details. You can generate a report for specified locations, organization units, and program attempt statuses.

Prerequisites

Enrolled unit attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Student List concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. Enter the load calendar to be considered.
3. Set the sort order required.
4. To set the parameters, refer to the following table.

The following table describes the Student List concurrent process parameters.

Table 4–25 Student List Parameters

Parameter	Description
Runtime Comment	Enter free format text to appear as comment on the first page of the report.

Table 4–25 (Cont.) Student List Parameters

Parameter	Description
Location 1	<p>Select a campus or study center that the educational institution conducts business or holds classes in for a specific load calendar to limit the report.</p> <p>You can select up to four different locations to be considered by the process.</p>
Organizational Unit 1	<p>Select to limit the student list to a business unit of the educational institution or organization responsible for the program in the given calendar.</p> <p>You can select up to two organizational units.</p>
Load Calendar	<p>Select the load calendar for which the process must consider program attempts.</p> <p>This is a mandatory parameter. If it exists, the values in the term record are used for processing.</p>
Start Type	Select a student type, such as Commencing , Continuing , or All to limit the report to that start type.
Attendance Type	Select an attendance type, such as full-time or part time to limit the report to this attendance type.
Attendance Mode	Select an attendance mode, such as distance learning, web-based, or direct to limit the report to the attendance mode.
Program Attempt Status 1	<p>Select a system-defined program attempt status. These are completed, discontinued, deleted, intermitted, enrolled, inactive, lapsed, or unconfirmed.</p> <p>If you do not enter a program attempt status, the process considers all enrolled program attempts by default.</p> <p>You can choose up to three different program attempt statuses.</p>
Order By	Select an option to sort the list by Surname or a combination of parameters such as location and surname, organizational unit and ID number. The default sort order for the student list is by ID.

4.5.19.3 Viewing List of Current Enrollment Details

You run the Student Current Enrollment Report concurrent process to generate a report that lists student program and unit enrollment details in the specified academic calendar. You can generate the report for a group of students by person ID or for a single student in a person ID group.

You can also obtain a list of students with a specified class standing, program attempt status, term/teaching calendar, unit set, organization, program, or location. Term record information is used if it exists. Otherwise, information from the program attempt is used.

Prerequisites

Enrolled program and unit attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Student Current Enrollment Report concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the Student Current Enrollment Report concurrent process parameters.

Table 4–26 Student Current Enrollment Report Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.
Person ID Group	Select a value to limit the report to students in a person ID group.
Person Number	Select a value to run the report for a single student in a person ID group.
Academic Calendar	Select the twelve-month period representing the cycle of academic activities which the report must consider. This is a mandatory parameter.
Term/Teaching Calendar	Select a term calendar to limit the report to the specified term.
Class Standing	Select a class standing to limit the report to a specific class standing.
Unit Set	Select a unit set to specify the unit set that the report must consider.

Table 4–26 (Cont.) Student Current Enrollment Report Parameters

Parameter	Description
Organizational Unit 1	Select to limit the report by the organization responsible for the program. You can choose to run the report for three different business units.
Program Code 1	Select to limit the report to students in a program in the given academic calendar. You can choose to run the report for students in up to three different programs.
Location 1	Select to limit the report by a campus or study center that the institution conducts business or holds classes in. You can choose to run the report for students studying in up to three different locations.
Program Attempt Status 1	<p>Select to limit the report by a system-defined program attempt status such as enrolled or completed.</p> <p>If you do not enter a program attempt status, the process considers all enrolled program attempts by default.</p> <p>You can choose to run the report for students with up to three different program attempt statuses.</p>
Attendance Type 1	<p>Select to limit the report by the attendance type such as full time or part time.</p> <p>You can choose to run the report for students with up to three different attendance types.</p>
Attendance Mode 1	<p>Select to limit the report by the attendance mode such as distance learning, web-based, or direct.</p> <p>You can choose to run the report for students with up to three different attendance modes.</p>
Select ATSI Student Only	Defaults to No . Select Yes to run the report for ATSI students only.
Select International Students Only	Defaults to No . Select Yes to run the report for international students only.
Using Government Contribution Payment Option 1	<p>Select to limit the report to students with the same government contribution payment option.</p> <p>You can choose to run the report for students under up to five different government contribution payment options.</p>
Include Address Details	Select Yes to include address details in the report. Select No to exclude these details.
Include Class Schedule	Select Yes to include class schedule in the report. Select No to exclude these details.

Table 4–26 (Cont.) Student Current Enrollment Report Parameters

Parameter	Description
Include Exam Schedule	Select Yes to include exam schedule in the report. Select No to exclude these details.
Sort By	The default sort order for the students is by surname in ascending order first, then by program and finally by organizational unit. You can choose any other of the combinations given.

4.5.19.4 Viewing Program Attendance Summary

Run the Program Attendance Summary concurrent process to generate a report that lists the number of students in a load calendar enrolled in a given organization, program offering option or programs.

The set of parameters enables the report to be run for all students in the specified programs or particular subsets of students.

Prerequisites

Enrolled program attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Program Attendance Summary concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Program Attendance Summary concurrent process parameters.

Table 4–27 Program Attendance Summary Parameters

Parameter	Description
Runtime Comment	Enter any additional information that needs to appear as comment on the first page of the report.

Table 4–27 (Cont.) Program Attendance Summary Parameters

Parameter	Description
Load Calendar	Select the load calendar to be considered by the process. This is a mandatory parameter. The concurrent process uses the term record associated with the load calendar.
Program Code1	Select to limit the report by a program for the given load calendar. You can choose up to five different programs for the process to consider.
Location	Select to limit the report by a campus or study center that the educational institution conducts business or holds classes in.
Attendance Mode	Select to limit the report by the attendance mode, such as distance learning, web-based, or direct.
Attendance Type	Select to limit the report by the attendance mode such as full time or part time.
Organizational Unit	Select to limit the report by a business unit of the educational institution or organization responsible for the program.
Start Type	Select to limit the report to the type of student such as new or returning. If you do not specify a student type, the report will consider all students.

4.5.19.5 Viewing Student List-Unit

You run the Student List - Unit concurrent process to generate a report that lists the number of students, in a given teaching calendar, enrolled either in units with specified unit statuses or in a unit class. You can also generate the list of students in the given teaching calendar by organizational unit or location. The default sort order is by student name.

Prerequisites

Enrolled program and unit attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Student List - Unit concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, refer to the following table.

The following table describes the Student List - Unit concurrent process parameters.

Table 4–28 Student List - Unit Parameters

Parameter	Description
Runtime Comment	Enter free format text to appear as comment on the first page of the report.
Teaching Calendar	Select the teaching calendar for which the report will list students enrolled in a unit class.
Organizational Unit	Select to limit the list of students enrolled in the teaching calendar further by a business unit of educational institution or organization.
Location	Select to limit the list of students enrolled in the teaching calendar further by a campus or study center the educational institution conducts business or holds classes in.
Unit Class	Select to limit the list of students enrolled in the teaching calendar further by the class in which the unit is taught such as day or night classes.
Unit Code 1	Select to limit the list of students enrolled in the teaching calendar further by a unit. You can run the report for up to five different units.
Unit Status 1	Select to limit the list of students enrolled in the teaching calendar further by the unit attempt status. You can run the report for up to three different unit attempt statuses for the same unit or for three different units.
Sort By	The report will display students by name. You can select other options given for sorting such as location or unit attempt status.

4.5.19.6 Viewing List of Students below Full Time Load

To generate a report to view the students who had dropped below the full load in a given term and teaching calendar and who have now returned to full load in the current term and calendar, run the Students Returning to Full Time Program Load report.

Values in the term record are used to determine the attendance type.

Prerequisites

Enrolled program attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Students Returning to Full Time Program Load concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Students Returning to Full Time Program Load concurrent process parameters.

Table 4–29 Students Returning to Full Time Program Load Parameters

Parameter	Description
Calendar - Drop below Full Load	Select the load calendar for which the report must generate a list of the students that have fallen below the full load.
Calendar - Return to Full Load	Select the load calendar by which students that had fallen below the load in the previous calendar may have returned to full load. If you do not select a value, the report will show for each student the respective calendar in which a student who had fallen below the load returned to full load.

4.5.19.7 Downloading a Class List

A class list is compiled information on specific classes that includes the names of students in a class and associated program and unit attempt details. For example, you might want to view a list of students in the summer semester for 2004 to review unit location and unit attempt information for students. You can use the Class List Query window to retrieve relevant records and then download the information.

Prerequisites

Program and unit attempt details exist.

Navigation

Enrollments > Class List Query

Steps

1. Query the appropriate unit code and teaching period.
2. Click **Retrieve List** to populate the **Student Unit Attempt** region.
3. Click **Download Records** to download the information as a separate file.

4.5.19.8 Viewing Statistical Details

Use the Enrollment Statistics window to view a summary report of the activity in a specific unit that details information such as the maximum limit of students who can be enrolled and number of students who are enrolled, waitlisted, dropped, or discontinued.

Prerequisites

Unit attempt details exist.

Navigation

Requests > Enrollment History > Unit Enrollment Statistics

Additional Notes

Use the Find Unit Sections window to enter appropriate search criteria. You can query by calendar, organization unit, unit code, or unit section. Statistical details of the queried unit section appear in the Unit Enrollment Statistics window.

The Other Unit Section Details region displays information pertaining to the unit version, organization unit, location, and unit mode.

Research manages information on all *research candidates* enrolled in your educational institution. Research candidates are those who have applied for or are enrolled in a research program and unit. Information handled by Research includes details on the student's research program, scholarship, milestones, supervisor, and submission dates.

This chapter details the following topics:

- [What's New in this Release](#)
- [Research Overview](#)
- [Research Student Enrollment](#)
- [Concepts](#)
- [Adding and Maintaining Research Details](#)

5.1 What's New in this Release

In this release, Oracle Student System has the following new and modified features:

- [Notifications Related to Confirmation, Milestones, and Exams](#)

5.1.1 Notifications Related to Confirmation, Milestones, and Exams

Milestone notifications now inform students, supervisors, and administrators of the creation of or updates to any milestone information.

You can also run a concurrent process that sends these notifications on specified days.

As and when a student registers for a research candidacy, a notification can be sent to the student, student supervisor, and administrator that details confirmation of the registration.

Students, principal supervisors, and thesis panel members can be notified when a thesis exam is submitted or resubmitted.

You can also notify students of the results of a thesis exam.

5.2 Research Overview

This overview consists of the following sections:

- [Candidacy](#)
- [Monitoring Days Used, Submission Dates, and Attendance](#)
- [Supervisors](#)
- [Scholarships](#)
- [Milestones](#)
- [Theses](#)
- [Tracking](#)

5.2.1 Candidacy

The Research Candidacy window is a single source through which all research details can be accessed, modified, and tracked. Using this window, you can also access other windows in the Research subsystem.

The Candidacy button is enabled in the Direct Admission window only if the admission process category includes **Research** as an admission step type. For more information, see [Creating a Research Application](#) in Admissions.

When **Research** is set as an enrollment procedure step, the Candidacy button appears as part of the Student Enrollments window.

5.2.2 Monitoring Days Used, Submission Dates, and Attendance

The Effective Full Time Days (EFTD) Used/Total, submission dates, and attendance entries maintained in the Research Candidacy window are important to monitoring a candidate's progress in the research program. The displayed number of effective

full-time days available and current number used gives candidates and their supervisors a clear picture of the amount of time remaining for the research.

A candidate with an attendance of less than 100% will consume only a portion of an EFTD, each calendar day.

Submission dates provide *deadlines* for the earliest and latest dates at which submission can be made. Research progress is evaluated against these deadlines in reviews conducted with the candidate. For more information, refer to [Milestones](#).

Variation in a candidate's attendance pattern is common over a candidature and these changes can be recorded by entering a new value to override the current Attendance Percentage value. Entry of a different attendance percentage value creates an entry in the candidate's *attendance history*.

The attendance percentage value is entered in the Research Candidacy Details window.

Attendance history provides a record of the candidate's attendance pattern, with each entry displaying a start and end date and applicable attendance % and type. These history values can be altered. For example a candidate's attendance pattern may be updated as part of a review meeting. This may require changes to both the Attendance % field and changes to the history records. Institutional policy determines how frequently attendance updates are to be made for research candidates.

5.2.3 Supervisors

A student can have one or more supervisors. *Supervisors* are those responsible for overseeing the progress of any research student. The Research Supervisors window is used to record and maintain all information about a candidate's supervisors.

5.2.4 Scholarships

Research candidates can receive multiple scholarships that apply over consecutive or concurrent date periods. These can include scholarships that come from an external organization or internal source. Student scholarships can also carry additional benefits such as travel awards or faculty prizes. Scholarships can have additional conditions, such as work experience in a particular field.

Each scholarship is tied to a scholarship type such as **Corporate** or **Federal** scholarships. Details of these institution-defined scholarship types and descriptions, organizational unit codes, and person IDs are entered and maintained in the Research Scholarships window.

5.2.5 Milestones

Milestones are points of evaluation set for each research program. Establishing and monitoring milestones enables research candidates, their supervisors, and administrative staff to maintain records about the candidate's progress and to initiate appropriate action at different stages of the research candidacy.

Each research program may have different phases and review points. This is why Oracle Student System provides the facility for an educational institution to define a set of milestones for a program.

5.2.6 Theses

A thesis submitted by a student has to be examined and assessed. All examination and assessment details are maintained in the Thesis Details window.

5.2.7 Tracking

The examination of a thesis and the communication between an examining panel member and the institution both require completing an established set of processes and tracking the location or transfer of documents. Tracking items created for either the examination or a panel member assist in ensuring that these occur as required.

5.3 Research Student Enrollment

Research students can be enrolled both through Admissions or Enrollment depending on setup.

To enroll a research student, the enrollment process category must include **Research** as a valid enrollment step. When this requirement is met, the Candidacy button appears in the Student Enrollments window.

Some details are mandatory before an offer of a place can be made, so should be recorded early in the Admissions process. These are the research topic, expected submission dates (which can be the system-calculated dates) and a principal supervisor.

These details should also be entered if a candidate's commencement date is different from the default program start date. The commencement date cannot be backdated any earlier than the Program Start Date Alias instance. The teaching period chosen for the application or enrollment must be one which allows entry of the applicable commencement date. Other non-mandatory candidature and thesis details can be entered at this stage if known, or at any time over the candidature

period. Once these details are entered, an *admission program application instance record* for the student is created, along with the underlying candidature details.

This section is divided into the following:

- [Pre-enrolling Research Students](#)
- [Enrolling Research Students](#)

5.3.1 Pre-enrolling Research Students

A research student can be pre-enrolled in a program if all the mandatory candidacy details exist and the educational institution makes an offer of admission. Pre-enrollment occurs automatically when the admission offer is made. If the student program attempt is entered directly in Enrollment, the candidate is pre-enrolled through the Batch Pre-enrollment Process concurrent process.

For more information, see [Pre-enrolling Students](#) in Enrollment.

On pre-enrollment, all candidacy details such as thesis details and the commencement date are copied to the student program attempt from Admissions. If the student has not confirmed the enrollment, the enrollment status is **Unconfirm**. If the student has confirmed enrollment, but has no enrolled units, the enrollment status is **Inactive**.

5.3.2 Enrolling Research Students

The student program attempt can continue to be processed through Admissions or Enrollment. Following are some typical steps:

- If the student accepts the offer, confirm the student program attempt either using the offer response functionality in Admissions or in the Student Enrollments window. The enrollment status is automatically set to **Inactive**.
- Add student unit attempts for all required research teaching periods in the academic year.

Research students who are not adding coursework units are enrolled in the research unit applicable to their discipline and research level. Usually, a student is enrolled in the same unit in all research teaching periods.

If research students add coursework units, EFTSU calculation is affected. For more information, refer to [Calculating EFTSU for Enrollment in Research and Coursework Units](#).

- Research unit attempts follow standard unit attempt behavior and are created as unconfirmed if either pre-enrolled or entered by the Bulk Unit Enrollment/Discontinuation concurrent process as unconfirmed. These unit attempts are set as confirmed if they are added using other methods.

After the student is enrolled in the research program and the related units, all research functions can be accessed directly from the Research menu rather than requiring users to navigate from the Direct Admission window or the Student Enrollments window.

After students enroll, you can perform the following tasks on the research candidacy:

- [Re-enrollment](#)
- [Unit Discontinuation](#)
- [Assessment Outcomes for Research Units](#)
- [Research Program Transfers](#)

5.3.2.1 Re-enrollment

You run the Batch Pre-enrollment Process concurrent process to re-enroll a candidate in units for subsequent teaching calendar instances. You can also use the same process to re-enroll candidates to programs for subsequent academic calendar instances.

For more information, see [Running Batch Pre-enrollment Process](#) in Enrollment.

5.3.2.2 Unit Discontinuation

Research students are discontinued from units using the standard discontinuation process.

For more information, see [Discontinuing Unit Attempts](#) in Enrollment.

Administrative unit statuses applicable to research units can be configured to allow discontinuation without any assessment penalty.

For more information on these administrative unit statuses, see *Oracle Student System Implementation and Administration Guide*.

5.3.2.3 Assessment Outcomes for Research Units

Assessment specialists may establish research-grading schema. For more information, see *Oracle Student System Implementation and Administration Guide*.

5.3.2.4 Research Program Transfers

You can transfer student details from an existing candidacy record from one research program to another. The following information is transferred to the new research program:

- Candidate's attendance history
- Thesis records excluding those deleted in the current candidacy
- Thesis exam details
- Panel member details
- Supervisor details
- Scholarship details
- Milestone details

For more information, see [Transferring Students between Program Attempts](#) in Enrollment.

The following apply to transfers:

- A candidature must exist in the current program for a program transfer to occur.
- If a candidature record already exists in the new program, the current candidature cannot be transferred.

5.4 Concepts

This section deals with special topics in the Research subsystem:

- [Calculating Days Used/Total and Submission Dates](#)
- [Calculating Research EFTSU](#)
- [Calculating EFTSU for Enrollment in Research and Coursework Units](#)
- [Overriding EFTSU of Zero for Research Units](#)
- [Valid Attendance Percentage Load Ranges](#)

5.4.1 Calculating Days Used/Total and Submission Dates

The Research subsystem uses EFTD to assist students in monitoring progress, to establish minimum and maximum dates for thesis submission, and to calculate the

Effective Full Time Student Units (EFTSU). A candidate’s research studies contribute to the total EFTSU for any given load calendar.

Research studies are not necessarily limited to the standard teaching periods that are used for coursework studies. The commencement date of a candidate’s research can differ from the commencement date of the defined program. The amount of time a research candidate allocates to research can vary over the research period.

Oracle Student System calculates both the current number of *EFTD Used*, and the total number of EFTD still available, or *EFTD Total*, for a research candidacy in the Effective Full Time Days Used and Effective Full Time Days Total lamps displayed in the Research Candidacy Details window. These values are used by Oracle Student System to calculate system-derived minimum and maximum submission dates.

If a candidate is enrolled in a research unit and studies at a standard full-time rate, or 100%, the candidate consumes one EFTD each calendar day. The same candidate studying at a standard part-time rate, or 50%, consumes only half of an EFTD each calendar day.

The following table describes sample EFTD Used and EFTD Total values calculated for full-time and part-time students.

Table 5–1 Sample EFTD Used and EFTD Total for Full-Time and Part-Time Students

Student	Attendance Percentage	Commencement Date	EFTD Total	EFTD Used by 24-Mar-2004
Candidate 1	100%	03-Mar-2004	730	22
Candidate 2	50%	03-Mar-2004	730	11

This section is divided into the following:

- [Calculating EFTD Used](#)
- [Calculating EFTD Total](#)
- [Calculating Maximum and Minimum Submission dates](#)
- [Sample EFTD Used, EFTD Total, and Submission Dates Calculations](#)

5.4.1.1 Calculating EFTD Used

EFTD Used is recalculated daily and each time there is a change in the attendance percentage for a candidate. The calculation of EFTD Used starts immediately after a candidate's student program attempt is confirmed.

EFTD Used is derived using data from the candidate's attendance history. It is possible that candidates have intermission periods in their attendance history. The inclusion or exclusion of the intermission periods is based on whether the Count in Progression check box is selected in the Basic Program Details window. For more information, see *Oracle Student System Implementation and Administration Guide*.

To calculate EFTD Used, Oracle Student System performs the following steps:

- Processes each attendance history record and multiplies the number of days by the attendance percentage.
- Totals the calculated value for each record.
- If intermission periods are excluded, calculates the intermission EFTD by multiplying the number of intermission days by the attendance percentage applicable before intermission, and subtracts this value from the EFTD Total.

To see an example for calculating EFTD Used, refer to [Sample EFTD Used, EFTD Total, and Submission Dates Calculations](#).

5.4.1.2 Calculating EFTD Total

EFTD Total is calculated only once, when a research candidacy record is created in the Research Candidacy Details window. EFTD Total is calculated using the Program Length and Program Length Measurement values for the program offering.

5.4.1.3 Calculating Maximum and Minimum Submission dates

Submission dates can be system-calculated values or can be manually overridden for a candidate. When the submission dates are system-generated, they are recalculated daily.

The maximum submission date, or **Max Submission Date**, is calculated from the current date using the EFTD Used, EFTD Total, and current attendance percentage recorded for the candidacy.

The formula used to calculate the maximum submission date is as follows:

Current Date + ((EFTD Total - EFTD Used) / Attendance Percentage / 100))

The minimum submission date, or **Min Submission Date**, is calculated from the current date using the EFTD Used, EFTD Total, and current attendance percentage recorded for the candidacy. The *minimum submission percentage*, an attribute of the program version established in the Basic Program Details window is also required.

The formula used to calculate the minimum submission date is as follows:

Current Date + (((EFTD Total X Minimum Submission Percentage / 100) - EFTD Used) / Attendance Percentage/100)

5.4.1.4 Sample EFTD Used, EFTD Total, and Submission Dates Calculations

From the given data, the EFTD Used, EFTD Total, and maximum and minimum submission dates for a student can be calculated as follows:

**Table 5–2 Sample EFTD Used, EFTD Total, and Submission Dates Calculation:
Sample 1**

Data	Calculation
Program Length:	(20/10) X 365 days
20	= 730 EFTD Total
Program Length Measurement:	
Days	
Attendance History:	50% of 92 = 46 days
01-Apr-2003 to 01-Jul-2003 at 50% attendance	80% of 364 = 291.2 days
	100% of 155 = 155 days
02-Jul-2003 to 30-Jun-2004 at 80% attendance	80% of 4 = 3.2 days
	= 495.4 EFTD Used
01-Jul-2004 to 02-Dec-2004 at 100% attendance	
03-Dec-2004 to 06-Dec-2004 at 80% attendance	
Student’s current attendance percentage:	730 - 495.4 = 234.6 days
80%	234.6 / 80%
	= 293.25 days remaining
Current Date = 07-Dec-2004	07-Dec-2004 + 293.25 days
	= 26-Sep-2005 Maximum Submission Date

Table 5–2 (Cont.) Sample EFTD Used, EFTD Total, and Submission Dates Calculation: Sample 1

Data	Calculation
Minimum Submission Percentage:	75% of 730 = 547.5 days
75%	547.5 - 495.4 = 52.10
Existing values apply	80% of 52.10 days = 41.68
	07-Dec-2004 +14.68
	= 18-Jan-2004 Minimum Submission Date

A second example shows a sample calculation of EFTD Used, EFTD Total, and maximum and minimum submission dates for another student:

Table 5–3 Sample EFTD Used, EFTD Total, and Submission Dates Calculation: Sample 2

Data	Calculation
Standard Full Time Completion:	(10/10) X 365 days
10	= 365 EFTD Total
Attendance History:	100% of 92 = 92 days
01-Apr-2003 to 01-Jul-2003 at 100% attendance	75% of 159 = 119.25 days
	= 211.25 EFTD Used
02-Jul-2003 to 07-Dec-2003 at 75% attendance	
Student's current attendance percentage:	365 - 211.25 = 153.75 days
75%	153.75 / 75%
	= 205 days remaining
Current Date = 07-Dec-2003	07-Dec-2003 + 205 days
	= 30-Jun-2004 Maximum Submission Date
Minimum Submission Percentage:	75% of 365 = 273.75 days
75%	273.75 - 211.25 = 62.5 days
Existing values apply	75% of 62.5 = 46.87 days
	07-Dec-2003 +46.87
	= 23-Jan-2004 Minimum Submission Date

5.4.2 Calculating Research EFTSU

Calculating *Effective Full Time Student Units* (EFTSU) for a research student unit attempt assumes the following:

- A student can be enrolled in one research unit that contributes to a load calendar instance, but can also be enrolled in coursework units that contribute to the same load calendar instance.
- Research load can only be calculated in a teaching period with a single census date.
- The maximum research EFTSU per load calendar is a calculated proportion of the maximum EFTSU per academic year. The maximum EFTSU per academic year is always **1.0**.

The EFTSU per load calendar is calculated by multiplying the maximum EFTSU per calendar year by the *load research percentage* assigned to the load calendar.

The following table describes a sample EFTSU per load calendar calculation.

Table 5–4 Sample EFTSU per Load Calendar Calculation

Teaching Period	Load Calendar	Load Research Percentage	EFTSU per Load Calendar
RES - 1	LOAD-CAL-1	50%	50% of 1.0 = 0.50
RES - 2	LOAD-CAL-2	50%	50% of 1.0 = 0.50
SUM	LOAD-CAL-3	Null	Not applicable

In the example (refer table), the teaching period, SUM does not have a specific load research percentage set and therefore the EFTSU calculation is not applicable.

The calculated research EFTSU is used in the following situations:

- The unit version of the student unit attempt is a research unit, the Research attribute is set in the Basic Unit Details window, and the teaching calendar is one in which the two research date aliases, effective start date and effective end date exists. For more information on teaching calendar instances, see *Oracle Student System Implementation and Administration Guide*.
- The teaching period contributes load to a load calendar instance that has a load research percentage between 0.01 and 100. Load research percentages are entered for a load calendar instance in the Calendar Instance Relationships window. The Sample EFTSU per Load Calendar Calculation would use the calculated research EFTSU.

The calculated research EFTSU is not used in the following situations:

- The student is enrolled in a research unit but in a nonresearch teaching calendar, or one without the research effective start and end date aliases. In this case, EFTSU is calculated in the standard way.
- The student is enrolled in a research unit in a research teaching period that contributes to a load calendar with a load research percentage of NULL. In this case, EFTSU is calculated in the standard way. In the Sample EFSTU per Load Calendar Calculation, a research unit offered in the SUM teaching period contributes to LOAD-CAL-3. Because this has a **NULL** Load Research %, EFTSU is not calculated using the research EFTSU calculation described here.

The calculated research EFTSU is adjusted when a candidate enrolls in both a research unit and coursework units.

The following are associated EFTSU calculations:

- [Recommended Effective Start and End Dates Alias Instances](#)
- [EFTSU Values and Adjustment Values](#)
- [Calculating Final Effective Full Time Student Units](#)
- [Sample EFTSU Calculations for a Research Unit](#)

5.4.2.1 Recommended Effective Start and End Dates Alias Instances

Because a majority of students start their research studies at the beginning of the academic year, it is expected that these students generate the maximum EFTSU for their attendance type.

However, educational institutions may also find it important that the load generated by a research student who begins research studies before the start of the first research teaching period in any academic period must also be claimed. In this case, the student can be enrolled in a research unit for a teaching period that contributes to a load calendar with a *NULL load research percentage*, and therefore the standard EFTSU calculation applies.

In the Sample EFSTU per Load Calendar Calculation example, the student is enrolled in the SUM teaching period generating a standard EFTSU for that teaching period.

The following table describes a structure within which an accurate EFTSU load can be calculated.

Table 5–5 Recommended Effective Start and End Date Alias Instances

Teaching Period Calendar	Start Date	End Date	Effective Start Date Alias Instance (RES-STRT)	Effective End Date Alias Instance (RES-END)	EFTD in Teaching Period
Res - 1	01-Jan-2004	30-Jun-2004	01-Mar-2004, the program start date alias for ADM-PER-1 calendar with no offset	18-Jul-2004, the program start date alias for ADM-PER-2 calendar with offset of -1 day	140
Res - 2	01-Jul-2004	31-Dec-2004	19-Jul-2004, the program start date alias for ADM-PER-2 calendar with no offset	05-Dec-2004, the program start date alias for RES-2 calendar with offset of +139 days	140
SUM	30-Nov-2004	28-Feb-2005	06-Dec-2004	28-Feb-2005	Not applicable

5.4.2.2 EFTSU Values and Adjustment Values

To calculate EFTSU for a research unit the following values are required:

- EFTD for the teaching period or the total number of EFTD between the effective start and end date aliases in the research teaching calendar
- Census attendance percentage, or the attendance percentage at the census date
- EFTSU per load calendar

Depending on a candidate's commencement date, attendance history, and periods of intermission, calculating EFTSU includes any or all of the following *adjustment values*:

- **High Adjustment:** This is calculated if the candidate has attendance periods prior to the census date, at a higher percentage than the census attendance percentage. The calculation uses the following formula:

(Higher Attendance Percentage - Census Attendance Percentage) X Number of Higher Percentage Days

- **Low Adjustment:** This is calculated if the candidate has attendance periods prior to the census date at a lower percentage than the census attendance percentage. The calculation uses the following formula:

(Census Attendance Percentage - Lower Attendance Percentage) X Number of Lower Percentage Days

- **Commencement Adjustment:** This is calculated if the candidate commences research after the effective start date alias instance for the research teaching period, since the candidate has not used the full number of EFTD for the teaching period calculated for the applicable calendar, an adjustment is required. The calculation uses the following formula:

(Effective Start Date - Commencement Date) X Candidate's Attendance Percentage at Commencement Date

- **Intermission Adjustment:** This is calculated if the candidate has an intermission period to be excluded. The calculation uses the following formula:

Attendance Percentage at Intermission Date X Number of Intermission Days

5.4.2.3 Calculating Final Effective Full Time Student Units

The calculation of final EFTSU, includes the following steps:

- Multiply the EFTD in the teaching period by the census attendance percentage
- Add the High Adjustment, if applicable.
- Subtract the Low Adjustment, Commencement Adjustment, and Intermission Adjustment, if applicable.
- Divide the result by the EFTD in the teaching period.
- Multiply the result by EFTSU per load calendar.

5.4.2.4 Sample EFTSU Calculations for a Research Unit

In the example given below, the following values apply in each scenario:

- Census attendance percentage is **40%**
- EFTD in the teaching period is **140** days
- Research load percentage is **50%**

- EFTSU per load calendar is **0.50**

The following table describes how to calculate research Effective Full Time Student Units, or EFTSU, for five candidates.

Table 5–6 Sample EFTSU Calculation for a Research Unit

Candidate	EFTD in Teaching Period X Census Attendance Percentage	Adjustments	Number of Days After Adjustments	Result After Adjustments/EFTD in Teaching Period	Result X EFTSU per Load Calendar
Candidate 1: Standard EFTSU calculation with no adjustments	56 days	None	56	$56 / 140 = 0.40$	$0.40 \times 0.5 = 0.2$ EFTSU
Candidate 2: for 3 week period in current teaching period, and before census date, attendance percentage was higher (50%)	56 days	(50% - 40%) X 21 = 10% X 21 days = 2.1 days High adjustment	$56 + 2.1 = 58.1$ days	$58.1 / 140 = 0.415$	$0.415 \times 0.5 = 0.207$ EFTSU
Candidate 3: For 3 week period in current teaching period, and before census date, attendance percentage was lower (25%)	56 days	(40% - 25%) = 15% X 21 = 3.15 days Low adjustment	$56 - 3.15 = 52.85$ days	$52.85 / 140 = 0.3775$	$0.3775 \times 0.5 = 0.188$ EFTSU

Table 5–6 (Cont.) Sample EFTSU Calculation for a Research Unit

Candidate	EFTD in Teaching Period X Census Attendance Percentage	Adjustments	Number of Days After Adjustments	Result After Adjustments/EFTD in Teaching Period	Result X EFTSU per Load Calendar
Candidate 4:	56 days	(01-Mar-2004 to 15-Mar-2004) X 40%	56-6	50 / 140	0.357 X 0.5
Commencement date 15-Mar 2004 and effective start date alias instance 01-Mar-2004		= 15X40% 6 days Commencement adjustment	=50 days	= 0.357	=0.178 EFTSU
Candidate 5:	56 days	40% X 14	56 - 5.6	50.4 / 140	0.36 * 0.5
Intermission period 14 days in teaching period before census date and no change to attendance percentage		=5.6 days Intermission Adjustment	=50.4 days	=0.36	=0.18 EFTSU

5.4.3 Calculating EFTSU for Enrollment in Research and Coursework Units

When a candidate enrolls in both a research and coursework unit, the EFTSU calculation for the research unit has important implications. The EFTSU determines the disbursement of income to organizational units within the institution. The *organizational unit owning the coursework* unit receives the coursework EFTSU proportion of the income generated, and the *organizational unit or units of the supervisor or supervisors* receive the research EFTSU proportion of the income. For example, the History department would receive the income from a history unit attempt (coursework unit) while the English department with which the supervisor is associated receives the income for the research EFTSU proportion of the income.

Unit EFTSU can be adjusted for a student if the Override Credit Points check box is selected for the unit. Overriding credit points reduces the EFTSU for a coursework unit and increases the EFTSU for a research unit.

The attendance percentage values includes the candidate’s attendance percentage for both research and coursework units.

For example, a student enrolled in a part-time program with a standard attendance percentage of 50% has an expected EFTSU of 0.250. This student enrolls in one research unit, using the research EFTSU calculation since it is within a research teaching period and contributes to a load calendar with an appropriate load research percentage.

At the same time, the student also enrolls to two coursework units, under a standard teaching period that have an EFTSU of 0.125 each.

The EFTSU for the research unit is zero since the coursework units use all the available EFTSU. The student has no time available for the research unit, the units require 75% attendance, and the attendance percentage exceeds the upper enroll load range for a part-time program. In this case, a warning might be issued and the attendance percentage entered in the Research Candidacy Details window should be altered.

When a candidate enrolls in research and coursework units, the calculation of EFTSU includes the following steps:

- The EFTSU for a candidate's attendance percentage is determined. This EFTSU becomes the ceiling value against which the combined research and coursework EFTSU is verified.
- The EFTSU for the research unit, or *StartingResEFTSU* is calculated.
- The EFTSU for the coursework unit or units, or *ProgramEFTSU* is retrieved.
- The *ProgramEFTSU* is subtracted from the *StartingResEFTSU* and results in the research EFTSU, or *ResEFTSU*.

The following two tables describe how to calculate combined research and coursework EFTSU calculation for two students with different attendance percentages:

Table 5–7 Sample Combined Research and Coursework EFTSU Calculation: Sample 1

Value	Calculation
Attendance Percentage	100%, full-time enrollment
EFTSU ceiling	0.5 X 1 = 0.5
Starting ResEFTS	0.5

Table 5–7 (Cont.) Sample Combined Research and Coursework EFTSU Calculation: Sample 1

Value	Calculation
ProgramEFTSU of 1 coursework unit	0.125
Total ProgramEFTSU	0.125
StartingresEFTSU - ProgramEFTSU = ResEFTSU	$0.5 - 0.125$ $= 0.375$

Table 5–8 Sample Combined Research and Coursework EFTSU Calculation: Sample 2

Value	Calculation
Attendance Percentage	75%, minimum for classification as full-time enrollment
EFTSU ceiling	0.5×0.75 $= 0.375$
Starting ResEFTS	0.375
ProgramEFTSU of 1 coursework unit	0.125
Total ProgramEFTSU	0.375
StartingresEFTSU - ProgramEFTSU = ResEFTSU	$0.375 - 0.375$ $= 0$

5.4.4 Overriding EFTSU of Zero for Research Units

Institutional policy may require that research students generate some income for the departments supervising them. In such cases, an EFTSU of zero will not be acceptable.

To override an EFTSU of zero, in situations when it is not acceptable, the following options are available:

- Override and lower a student's coursework EFTSU, and the organizational unit or units supervising the student's research receive a higher proportion of the income generated

In this case, a fixed override value is used instead of a calculated override value.

- Override a student’s research EFTSU, allowing disbursement of income to the organizational unit or units supervising the student’s research

The income disbursement can be out of proportion with the requirements of the educational institution, resulting in an EFTSU exceeding the standard EFTSU for full-time or part-time studies in a given period.

In this case, a fixed override value is used instead of a calculated override value.

- Enroll a student in all units under a teaching calendar that has a subordinate load calendar where the load research percentage is NULL

In this case, the research and coursework EFTSU is calculated in the standard way.

5.4.5 Valid Attendance Percentage Load Ranges

The concept of *valid attendance percentage load ranges* is an important part of the candidacy details. You must enter an attendance percentage for a student candidacy record. This is validated against the load ranges defined for the program offering. These load ranges are defined as *Effective Full Time Student Units (EFTSU)* in Oracle Student System. Each load range has a lower and upper load.

For more information on load ranges for attendance types, see *Oracle Student System Implementation and Administration Guide*.

When an attendance percentage is entered, an EFTSU is calculated for the attendance percentage and checked against the load ranges. If the calculated EFTSU falls outside the range for the program attendance type, a warning is issued.

The same warning is issued if there is a change in the student's program offering option.

Example

The following table describes lower and upper loads for full-time and part-time students.

Table 5–9 Sample Load Range for Full-Time and Part-Time Students

Load Range	Full-time Students	Part-time Students
Lower Load	0.375	0.001

Table 5–9 (Cont.) Sample Load Range for Full-Time and Part-Time Students

Load Range	Full-time Students	Part-time Students
Upper Load	20.00	0.374

A candidate enrolls in the following:

- A program offering with a full-time attendance type **and**
- A research unit in the current teaching period

The *load research percentage*, in this case, is **50%**. This percentage is set for each attendance type. For information on load research percentage, see *Oracle Student System Implementation and Administration Guide*.

The *attendance percentage* entered is **40%**. The EFTSU for this attendance percentage is calculated as follows:

(Load Research Instance Percentage divided by 100) multiplied by **(Candidate's Attendance Percentage divided by 100)**

= **0.5** multiplied by **0.4**

= **0.2**

In this case, since the EFTSU is less than the lower load for a full-time student (refer table), the system issues a warning.

5.5 Adding and Maintaining Research Details

This section describes the following tasks:

- [Adding/Updating Candidacy Details](#)
- [Adding Supervision Details](#)
- [Adding Scholarship Details](#)
- [Adding Research Milestones](#)
- [Notifying Users of Milestones](#)
- [Maintaining Thesis Details](#)
- [Checking for Overdue Submissions](#)

To import legacy information on supervisors and theses to Oracle Student System, populate the following interface tables and then run the Legacy Import Process for Enrollments and Records concurrent process:

- IGS_RE_LGCY_SPR_INT for Research Supervisors Details
- IGS_RE_LGCY_THE_INT for Research Thesis Details

For more information, see *Oracle Student System Open Interfaces User Guide*.

5.5.1 Adding/Updating Candidacy Details

The Research Candidacy Details window allows the capture, processing, and control of all candidature details. It is the central window in the Research subsystem and all other functional windows can be accessed from it.

An enrolled research student's candidature record has at a minimum the mandatory candidature details (Research Topic, Principal Supervisor, and Min and Max Submission Dates). A default Attendance % value and system-calculated values for the effective full-time days used and total available (EFTD Used/Total) will also exist.

The start date, and the minimum (first) and maximum (last) submission dates are automatically calculated from the program start date and length of the program. The attendance percentage is also calculated automatically. For more information on how these values are calculated, refer to [Research Student Enrollment](#).

Research staff can complete and update the candidature details using this window, at any time throughout the candidature. This may involve entering information about a candidate's links with the industry.

If a candidate, in consultation with his or her supervisor, nominates different submission dates, the overriding of system-calculated dates should be done in accordance with institutional policy relating to consultation and approval of changes to submission dates.

The research topic, entered prior to an offer being made, may have been a very broad description of the candidate's planned research. Editing of this topic to ensure it is more accurate may be required after research has begun.

Research codes are used to provide statistical information for government reporting and are entered in the Research Candidacy window. For information on research codes, see *Oracle Student System Implementation and Administration Guide*.

A candidate's attendance history is used to calculate the EFTD consumed. The attendance percentage indicated indicates what percent of a day is consumed by a

system day. For example, an attendance percentage of 100% indicates a complete day is consumed, while an attendance percentage of 50% indicates that half a day is consumed for each calendar day.

The Research Candidacy Details window also provides a summary view of the current status of any thesis associated with this candidate. A candidate can have multiple theses and an information lamp in the window notifies the user where multiple theses exist.

Additional data collection, monitoring, and reporting can be done using the other windows accessed through the buttons in this window. These additional windows are used to record or update data relating to theses, scholarships, milestones, and supervision.

Prerequisites

The step for research candidacy is included for the program step type in setup.

Research programs are defined.

Navigation

Enrollments > Research > Research Candidacy Details

Steps

1. Query a research candidate record to enter or modify candidature details in the Research Candidacy Details window.
2. Enter the topic of the research and industrial links in the appropriate tabs.
3. In the Thesis Summary region, enter the title of the thesis and the date that the student expects to submit the thesis.
4. Save your work.

5.5.2 Adding Supervision Details

Research candidates will have one or more supervisors spread across their research candidacy. Details about the supervisor are maintained in the Research Supervisors window.

Educational institutions determine policy regarding the qualifications and the number of supervisors required for a candidate. Oracle Student System requires that there be, at a minimum, one *principal supervisor*. This supervisor is recorded at the Admissions stage. Additional supervisors, if known, can also be recorded

during the admissions process. They can be added at any time during the candidature, such as when staff changes or a need for additional supervisors arises. Supervisors whose supervision period cannot cover the whole of the candidate's research period, have their supervision period recorded through an end date.

Supervisors may be institution staff or external to the institution. Where a supervisor is from outside the institution, the person's details must be added to the database so that he or she can be recorded as a supervisor. This can be done using the Research Supervisors window.

A candidate's supervision arrangements are the basis for the distribution of income, generated by the student, to the organizational units within the educational institution. Payments to external supervisors cannot be handled by Oracle Student System. Payments to internal supervisors, on the other hand goes towards funding the supervisor's department. This is why supervisory and funding percentages may not be the same.

The business event, oracle.apps.igs.re.sprvsn.update, is raised whenever a supervisor is assigned to a research candidacy or when attributes of a candidacy's supervision change in the Research Supervisors window. The related workflow notifies the student and the administrator of the change.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation Guide* about these business events. See *Oracle Workflow User's Guide* for information about creating workflows for business events.

Prerequisites

Supervisor types are defined.

Navigation

Enrollments > Research > Research Candidacy > Supervision

Steps

1. Add the person number in the Person Number field in the Research Supervisors window.
2. Enter the supervisor name in the Name field.
3. Enter a period for supervision in the Start Date and End Date fields.
4. In the Supervised % field, you can add the percentage of the research program, for which the supervisor is responsible.
5. Save your work.

5.5.3 Adding Scholarship Details

Research candidacy details include any scholarships that the student might have received for the research program. Scholarship details include a scholarship type, such as **Academic** or **Federal**, and a scholarship period with specified start and end dates. You can also enter additional information on benefits and conditions that apply to the scholarship.

Prerequisites

Research candidacy details exist.

Scholarship types are set up.

Navigation

Enrollments > Research > Scholarship Details

Steps

1. Query a research candidate in the Scholarships Details window.
2. Select a scholarship category from the Scholarship Type list of values. The Scholarship Type Details tab region automatically displays the associated details for the selected scholarship type.

A **Closed** scholarship type appears in the list of values, if the current record was created prior to the closing of the type. For details on closing scholarship types, see *Oracle Student System Implementation and Administration Guide*.
3. Enter a start date for the scholarship in the Start Date field. Scholarship type and start dates cannot be modified once they are saved.
4. Enter an end date in the End Date field. If multiple scholarship details are entered, an existing scholarship type cannot be used if the applicable date periods overlap.
5. Enter additional details that apply to the scholarship in the Scholarship Description, Other Benefits and Conditions tabs.
6. Save your work.

Additional Notes

When accessed from the Research Candidacy Details window, the candidate's details from that window are displayed and cannot be modified or queried.

5.5.4 Adding Research Milestones

Educational institutions define milestones for *each research program*. These program default milestones are specified during setup. For more information, see *Oracle Student System Implementation and Administration Guide*.

Milestones for *a particular candidate* are specified in the Candidacy Milestones window. For most candidates, the set of program default milestones is applicable. However, you can delete milestones that are not required and add new milestones. You can also designate a milestone to be a prerequisite to another milestone.

Each milestone has a due date. Typically, supervisors assess a candidate's progress against a milestone's due date in a review meeting, and the status of the milestone is changed to indicate progress. For example, the status of a completed milestone is **Achieved**.

Renegotiating milestones that have not been achieved and penalties for failure in achieving milestones depend on the educational institution's policy.

For example, an educational institution can adopt a policy according to which the due date is changed and the milestone status updated to **Re-planned** if the supervisor agrees that progress has been made in the research program, but the candidate needs more time. If progress has not been satisfactory, the status is changed to **Failed**, and a second review meeting is arranged to reassess progress. At this second meeting, the status can be updated to **Achieved** or **Re-planned**, as appropriate.

A milestone business event is raised when there are changes to the Milestone Type, Due Date, Milestone Status, and Date Reached. The business event is also raised if any planned milestone is deleted. The related workflow notifies students, administrators, and supervisors based on the notification days specified.

For information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide* about the business event related to such notifications. See *Oracle Workflow User's Guide* for information about creating workflows for business events.

Prerequisites

Research candidacy details exist.

Navigation

Enrollments > Research > Research Milestones

Steps

1. Query a research record in the Research Milestones window.
2. Select an appropriate milestone from the Milestone Type list of values. The Milestone Status field defaults to **Planned**. You can select an alternative status from the list of values.
3. Add a due date for the milestone to be achieved in the Due Date field.
4. Enter the date the milestone is reached in the Date Reached field. This needs to be specified if the status is **Achieved** or **Failed**.
5. The Preceding milestone details, if activated lists the preceding milestone to the one selected.
6. Enter notes related to the review of a candidate's progress in the Comments field.
7. In the Notification region, you can specify days when reminders of the milestone due date should be sent.

These check boxes specify the number of days in advance of the submission date, that the notification will be sent. If any of the notification values is set to zero, the notifications are sent on the submission due date.

Additional Notes

When accessed from the Research Candidacy Details window, the candidate's details from that window are displayed and cannot be modified or queried.

5.5.5 Notifying Users of Milestones

You run the Milestone Due Date Notifications concurrent process to find all milestones that have not been reached. The concurrent process will find all milestones that do not have a status of **Achieved**. These milestones are then checked for notification information specified in the Research Milestones window.

On the day indicated by the value in the Notification Days region, the concurrent process will send notifications to students, supervisors, and administrators. For more information, see [Adding Research Milestones](#).

Prerequisites

Active candidacy records with milestone due dates passed exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Additional Notes

Run the Milestone Due Date Notifications concurrent process. For information on running the concurrent process, see [Concurrent Process Procedures](#).

This concurrent process has no parameters.

5.5.6 Maintaining Thesis Details

The Thesis Details window maintains all thesis data associated with a candidacy. The educational institution's policy determines when thesis information is entered. You can enter a thesis summary including thesis title, expected submission date, status, and result in the Thesis Summary region.

To enter information in the Thesis Details window, the following rules are valid:

- The Final check box must be selected before a thesis can be submitted. The Final indicator is set when the candidate confirms that the thesis title is finalized.
- Citation, library lodgement, and embargo details cannot be entered until the thesis is submitted for examination.
- The final result cannot be entered until the thesis examination process is complete.
- A candidate can have multiple thesis entries and a single thesis can have multiple examinations.
- A thesis record can be deleted if the thesis is not submitted. The record is not removed, but it is marked as a deleted thesis, and can be displayed if required.

Oracle Student System raises business events and generates notifications in the following cases:

- When a thesis topic or title is entered, changed, or approved in the Thesis Details window. The business event is also triggered if a deletion date that was placed against a thesis title is removed. The related workflow notifies the student and administrator of the change in the thesis topic.
- When thesis details are changed in the Thesis Details window. The related workflow notifies the student and administrator of the changes.

- When a thesis exam is submitted for the first time or resubmitted. The related workflow notifies the student, the principal supervisor, and the thesis panel member of the submission.
- When there is a change in the thesis results of the research candidacy. The related workflow notifies students, supervisors, and administrators of the changes.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation Guide* for information about these business events. See *Oracle Workflow User's Guide* for information about creating workflows for business events.

Maintaining thesis details can be divided into the following tasks:

- [Using the Tracking Subsystem](#)
- [Creating an Examining Panel](#)
- [Examining a Thesis](#)

5.5.6.1 Using the Tracking Subsystem

Using tracking items, you can monitor the movement of documents, or progress of defined processes such as, progress toward completing a thesis examination, and the communication between an examining panel member and the institution. Creating tracking items is not mandatory, but can be helpful in managing the thesis examination process.

Two system tracking types in the Research subsystem are associated with sets of steps that are followed when a tracking item associated with the tracking type is initiated:

- Tracking type **RES-TEX** is used when a tracking item is initiated for a thesis exam.
- Tracking type **RES-TPM** is used when a tracking item is initiated for a thesis panel member.

The steps associated with tracking types are defined by Research specialists when setting up the system. These steps are set as the default, but can be changed or bypassed by the user. For example, if a tracking item is created for each prospective panel member, a number of steps can be bypassed for those who decline to join the panel.

For more information on the Tracking subsystem, see *Oracle Student System Implementation and Administration Guide*.

A *tracking item* is created by using the Tracking button in the Thesis Examinations window, against the Thesis Exam or Thesis Panel Member. Once the item has been created, it can be opened and updated when required, using the same button. For each step in a tracking item, Oracle Student System inserts action dates. As and when steps are completed, you need to add appropriate completion dates.

Notes can be added about any step. Steps that do not need to be completed can be bypassed. For example where a tracking item is created for each prospective panel member, a number of default steps can be bypassed for those who decline to join the panel.

5.5.6.2 Creating an Examining Panel

Procedures for the examination of a thesis and the creation of examining panels are well established in educational institutions which offer research studies. These subsystem functions are designed to be used with these established procedures. For example most educational institutions have a required notification of submission period for a thesis. When a candidate gives this notification, the expected submission date can be entered in the Thesis Details window. The process of recording the examination and establishing the examining panel may, in some institutions, begin on nomination of an expected submission date. Other institutions may allow this process to begin before the submission date has been nominated.

An examining panel consists of panel members who examine theses submitted by research candidates. An examining panel is not mandatory. There might be situations where the Research subsystem is used only for maintaining examination details of students. For example, research functionality might be used only to record the examination of a special project undertaken by an undergraduate student. In such cases, the examining panel details are not entered in the Thesis Details window.

For each member that you add to the examining panel, you must specify a *panel member type*. Panel member types are specified during setup and have an associated *recommended size*. Panel types and the recommended size associated with them can be viewed in the Thesis Panel Types window. For more information, see *Oracle Student System Implementation and Administration Guide*.

If the panel member type is associated with a recommended size, and a panel is created with less than the recommended number of members, a thesis result cannot be entered for this examination.

Prerequisites

Candidacy details exist.

Exam and panel types are set up.

Navigation

Enrollments > Research > Thesis Details > Thesis Examinations

Steps

1. Enter the person number of all prospective panel members in the Thesis Examinations window.
2. Select a panel member type from the Panel Member Type list of values.
3. Click **Tracking Item** to create a tracking item for each panel member, if required. This tracking item provides a 'checklist' of procedures and communication between the institution and the prospective panel member. Once a tracking item is created, it can be updated when required using the same button.
4. Select the Confirmed or Declined check boxes depending on the panel member's response to record each prospective panel member's response to the invitation.
5. Save your work.

Additional Notes

When accessed from the Research Candidacy Details window, the candidate's details from that window are displayed and cannot be modified or queried.

5.5.6.3 Examining a Thesis

Procedures for examining a thesis depend on institutional policy. Most institutions require candidates to give notification of the submission period for a thesis. When a candidate gives this notification, the submission date is entered in the Thesis Details window.

As the examination process progresses, enter the Recommended Result and Remarks from each confirmed panel members as they are received. When the examination process is complete, a Thesis Result is entered for that examination, in the Thesis Exam region. If an examining panel exists, entering a result which matches none of the Recommended Results entered for the panel members triggers a warning.

The payment date for examiners is entered as required. This and the Examiner's Remarks are the only fields which can be altered after a Thesis Result has been entered against the thesis examination.

When there is to be no further examinations of this thesis and all existing examinations have a Thesis Result entered, the Final Result can be entered. The status of the thesis then becomes **Examined**.

A thesis can have multiple examinations. For example, there could be a written as well as an oral examination. A thesis may also be examined and returned for revision and resubmission. These conditions, therefore, require details of an additional examination being recorded. In such cases, a submitted thesis exam must also have an associated thesis result to be able to add the next thesis examination.

Prerequisites

Thesis exam and panel types are set up.

Navigation

Enrollments > Research > Thesis Details > Thesis Examinations

Steps

1. Query a research candidate in the Thesis Examinations window.
2. In the Thesis exam region:
 4. Select an exam type from the Thesis Exam Type field.
 5. Select a thesis panel type from the Thesis Panel Type field.
 6. Click the Tracking Item button to initiate steps associated with tracking the thesis.
3. If an examining panel exists, in the Thesis Panel Member region:
 1. For a thesis exam, enter the result recommended by each panel member in the Recommended Result field.
 2. Enter the remarks from each panel member.
4. When the examination process is complete, enter the result for the thesis examination in the Thesis Exam region.
5. Enter the payment date for examiners, as required in the Thesis Panel Member region. Entering a result that does not match any of the recommended results from panel members triggers a warning.

6. When all thesis examinations have occurred, and all thesis results are entered, enter the final result. The status of the thesis in the research Candidacy Details window changes to **Examined**.

Note: The Payment Date and the Examiner's Remarks are the only fields that can be altered after a thesis result is entered for the thesis examination.

7. Save your work.

Additional Notes

When accessed from the Research Candidacy Details window, the candidate's details from that window are displayed and cannot be modified or queried.

5.5.7 Checking for Overdue Submissions

When research candidates do not submit a thesis in time, the submissions are categorized as *overdue submissions*. To check for all overdue submissions, run the Enrollment Notification concurrent process. This process sends notifications to students within an academic calendar and within a specific submission date.

This concurrent process triggers the oracle.apps.igs.re.subm.overdue business event that notifies the student that the thesis is overdue for submission.

For more information, see Appendix B, Workflow in *Oracle Student System Implementation Guide* for information about these business events. See *Oracle Workflow User's Guide* for information about creating workflows for business events.

Prerequisites

Theses with overdue submission dates exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Enrollment Notification concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the Enrollment Notification concurrent process parameters.

Table 5–10 Enrollment Notification Parameters

Parameter	Description
Academic Calendar	Enter the relevant academic calendar.
Notify of Overdue Submission Offset Dates	<p>Enter the last submission date that the process must take into consideration. This field can have the following values:</p> <p>Zero: If set to zero, the concurrent process finds all students whose maximum submission date is equal to the date the concurrent process is run and raises a business event against these students.</p> <p>Negative Integer: If set to a negative integer, the concurrent process finds all students whose maximum submission date specifies comes the specified number of days after the concurrent process is run. For example, if the parameter is set to -5, then the system finds all students whose maximum submission date is five days beyond the date the concurrent process is run.</p> <p>Positive Integer: If set to a positive integer, the concurrent process finds all students whose maximum submission date was that number of days in the past at the time the concurrent process was run. For example, if the parameter is 2, then the concurrent process finds all students whose maximum submission date was two days before the concurrent process is run.</p>

Academic Records

Educational institutions maintain student academic records for the purpose of determining advanced standing, unit assessments, progression, and identifying qualified graduates for graduation.

This chapter details the following topics:

- [What's New in This Release](#)
- [Academic Records Overview](#)
- [Evaluating Applications for Advanced Standing](#)
- [Assessing a Unit Attempt](#)
- [Managing Academic Statistics](#)
- [Applying Progression Rules and Outcomes](#)
- [Applying Program Completion Rules](#)
- [Managing Graduation](#)
- [Processing Degree Audit](#)
- [Ordering and Producing Documents](#)

6.1 What's New in This Release

In this release, Oracle Student System has the following new and modified features:

- [Assessment Item Groups](#)
- [Release Grades to Students](#)
- [View Grade Details](#)

- [Business Events and Workflows](#)
- [Derive Marks for Student Unit Attempt Outcome](#)
- [Program Completion and Awards](#)
- [Session Details](#)
- [Transcript Comments](#)

6.1.1 Assessment Item Groups

The existing grading policy involved unit assessment patterns. When students enrolled in unit attempts, they are assigned an assessment pattern, which automatically associates assessment items to the unit attempt. But, faculty/administrator was unable to derive unit attempt outcomes from the unit assessment item outcomes.

In the current release, new assessment item group functionality is introduced in place of the existing unit assessment patterns. You can create unit assessment item groups and define final and midterm grading periods.

6.1.2 Release Grades to Students

You can now assign a default date and time for release of grades to students using the Release Unit Section Grades to Students concurrent process.

In the Select Assessment Item Grading Options self-service page, you can restrict a faculty from entering assessment item outcomes for students whose grades have been submitted for finalization.

Enter Assessment Item Outcome self-service page, you can now record additional assessment item outcome details such as an assessment item being waived for a specific student, or a penalty being applied to the assessment item outcome for a specific student. You can also choose the date on which the assessment item outcome is to be released to the student.

The release outcome functionality has been moved from the View Assessment Item Outcome self-service page to Enter Assessment Item Outcome self-service page.

In the Enter Grade self-service page, you can select the date and time at which students can view their grade details and derive student unit attempt marks from assessment item marks. The Release Grade button is not displayed for a faculty, if the Allow Faculty to Finalize Grades check box is disabled in the Mark/Grade Entry configuration window. The Derive Grade button is disabled if Derive Unit

Grades from Assessment item Grades check box is deselected in the Mark/Grade Entry Configuration window.

A new Release Grade self-service page is introduced to allow the faculty and administrator to select the date and time at which students can view their outcomes.

The Enter Grade Web ADI spreadsheet is being enhanced to record additional student unit attempt outcome details, for example, whether a certain unit attempt is being capped for a specific student, or select the date and time at which students can view their grade details. You can also derive student unit attempt marks from student assessment item marks.

6.1.3 View Grade Details

Students can now obtain details of their respective unit attempt and assessment item outcomes through the new View Grade Details self-service page. This page replaces the View Unit Assessment Item Outcome page.

6.1.4 Business Events and Workflows

The Inform instructor that unit section grades have been submitted (oracle.apps.igs.as.usgrdsub) business event is raised to inform the lead instructor that grades have been submitted.

The Inform instructor that unit section grades have been submitted workflow is initiated to send notification to the lead instructor when grades are submitted.

Inform instructor about Assessment item grades release (oracle.apps.igs.as.aigrdrel) to student business event is raised to inform the lead instructor about the release date of assessment item outcomes.

Inform instructor about Assessment item grades release to student workflow is initiated to send notification to the lead instructor when grades are released to students.

6.1.5 Derive Marks for Student Unit Attempt Outcome

In the current release, you can view unit assessment item attributes and automatically derive student unit attempt outcomes from student unit assessment item outcomes. This functionality has been achieved by replacing the Assessment Patterns with the new concept of Assessment Item Groups. Through the use of Assessment Item Groups, you can define mark derivation attributes, for Midterm and/or Final Grading Period, for any assessment items associated with a unit or

unit section. You can customize the inherited mark/grade derivation attributes for any student unit attempt.

You can manually override the automatically derived unit attempt outcomes.

You can restrict faculty from finalizing the student unit attempt outcome and only allow administrators to perform the final step of the grade finalization process.

6.1.6 Program Completion and Awards

Award and conferral information is now separate from graduation-related information. Students can complete a program attempt and be eligible to graduate, but not receive an award. In such cases, the administrator requires the flexibility to indicate that an award is outstanding. The current release allows completion of program attempts independent of awards.

In the current release, the award conferral date, award mark, and grade are assigned to student program attempt award records instead of graduand records.

A new history window is introduced to view changes to a student program attempt award.

6.1.7 Session Details

A new Session Details self-service page is introduced to list the sessions for a unit section. A new Enter Session Details self-service page is introduced to enter session details for a unit section.

A new Enter Attendance for Session self-service page is introduced to enter attendance for unit sections and unit attempts.

6.1.8 Transcript Comments

You can now record, store, and print transcript comments.

6.2 Academic Records Overview

An academic record maintains a history of a student's progress in course work and academic career. The Academic Records subsystem consists of the following parts:

- [Advanced Standing](#)
- [Assessment](#)
- [Academic Statistics](#)

- [Progression](#)
- [Program Completion](#)
- [Degree Audit](#)
- [Graduation](#)
- [Order and Produce Documents](#)

6.2.1 Advanced Standing

Advanced standing or *transfer credit* refers to the recognition of student prior study or work experience as equivalent to units in the current program. If units studied earlier are judged to be equivalent to units in the program applied for, then the student, is exempt from repeating the unit and receives credit points for it.

For a student to be granted advanced standing, units offered in different universities must be comparable. To this end, faculty review the unit content to identify comparable units for transfer credit. These units are called *articulated units*. Successful completion of an articulated unit in one campus, enables students to progress to the next level of instruction at another campus.

Advanced standing in Oracle Student System can be recorded:

- Against a specified unit
- At a unit level

Unit Advanced Standing

When a student is granted advanced standing for a unit, one of the following occurs:

- The student receives credit and is exempted from taking the unit.
- The student receives partial credit and is exempted from some study requirements.
- The student is precluded from enrolling in the unit, but can enroll in alternate units. No credit is granted for prior study or experience.

Unit Level Advanced Standing

Unit level advanced standing is granted when it is not possible to identify an equivalent unit for prior studies in the current program.

Advanced standing for a unit level recognizes that prior studies, experience, or expertise is relevant to the current program attempt, and equivalent to credit points at a particular unit level or levels. For example, a student with a diploma in Fine Arts applies for advanced standing in a Bachelor of Arts program. The student is granted eight junior-level credit points of advanced standing.

6.2.2 Assessment

Assessment tracks student progress and manages the academic evaluation of students enrolled in units of study.

The assessment process involves:

- Managing assessment items
- Defining grades
- Assigning outcomes to assessment items and unit attempts
- Evaluating applications for special consideration

A unit comprises assessment items, including tests, assignments and papers, used to evaluate and grade student progress. An assessment item can be examinable such as tests and quizzes, or non-examinable such as assignments, essays, and projects.

When a unit attempt or assessment item is evaluated, the faculty or designated personnel enter relevant outcomes. An outcome can be a mark such as 82%, or a grade, such as A, or both. Sets of grades or marks are called *grading schema*. Grading schema are associated with units, unit sections, and assessment items. For information on grading schema, see *Oracle Student System Implementation and Administration Guide*.

Students who have been ill or have had personal problems that have affected their ability to perform academically, apply for special consideration. A board of examiners or designated authority evaluate the applications for special consideration and assign a final outcome, or defer the examination.

6.2.3 Academic Statistics

Academic statistics measure a student progress and academic success. Different academic statistic types include:

- Attempted Credit Points: The number of credit points attempted by the student.

- **Earned Credit Points:** The number of credit points successfully completed by the student towards degree completion.
- **Grade Point Average (GPA):** Student average grade across subjects and students. Each subject result is given a grade point value, for example, A=4, B=3, C=2, D=1, F=0, and an average is then derived.
- **Quality Points:** This is the value associated with a grade per credit hour. A credit hour includes time spent in class, in the laboratory or in an activity, and the time spent preparing (reading, analyzing, writing). Quality points are derived by multiplying the number of quality credits by the mathematical equivalent credit of the grade. For example, A 3 SH (semester hour) course with a grade of an A (numerical equivalent value of 4) has 12 quality points. Quality credits are the number of credits for which students are enrolled that count toward their grade point average.
- **GPA Credit Points:** The total of credits for the student unit attempts (pass or fail outcomes) in which the grading schema for the unit is specified to be included in the GPA. Normally, Letter Grades (A-F) are included while Pass/Fail (P/F) grades are not. This number may or may not be the same as Earned, depending on grading schemas and unit attempts.

Class Standing and Class Rank

Class standing and class rank use academic statistics to calculate their values.

Class standing indicates student position in the enrolled program. Student class standing is based on the total number of completed credits. For example, a student is considered a Sophomore for completing 29-60 semester credits, Junior for 61-92 semester credits, and Senior for 93 semester credits or more. The Earned Credit statistic is calculated to determine the student class standing at that period of time.

Grade point average and class rank reflect the achievement of all students during their enrollment. *Class rank* is the relative numerical position of a student in a graduating class, calculated on the basis of grade point average. Consider a graduating class of 100 students. The basic concept is to list from highest to lowest the computed grade point averages (GPAs), for example, giving the student with the highest GPA the rank of one, and the student with the second highest GPA the rank of two.

Class ranks are reported in terms of the student's position relative to the number of students being ranked (the ranking cohort). Class rank cohorts are defined to assess student relative performance against the rest of the class. For example: number 10 out of a class of 100 students.

6.2.4 Progression

Assessment of student performance is used to measure student progress towards degree completion. The system administrator defines progression rules that apply measures such as grade point average, weighted average marks, credit points attempted and earned, and class standing to track student performance.

Progression is also measured through degree audit, which can be used periodically to calculate the GPA and identify the number of credits required for program completion. For more information on Degree Audit, see *Oracle Student System Implementation and Administration Guide* and [Processing Degree Audit](#).

Progression rules are grouped into the following rule categories:

- Credit-based: Rules based on the number of credit points required. For example, a student must have earned 12 credit points to pass the rule.
- GPA-based: Rules based on the student grade point average. For example, a student must have a GPA of 2.5 to pass the rule.
- Grade-based: Rules based on grades received. For example, a student must have received an A grade in Basic Accounting to enroll into Advanced Accounting.
- Mixed rules: A combination of Credit, GPA, and Grade-based rules.

Progression rules have calendars and outcomes associated with them. An outcome is the action taken when a student fails a rule. Each progression rule can have more than one outcome.

Outcomes can be positive such as awards, or negative such as holds. An award is a degree conferred on completing the program. A hold is the penalty applied to a student for failing a progression rule. All academic holds are applied and released through the Progression subsystem only. For information on holds, see *Oracle Student System Implementation and Administration Guide* and [Person](#).

The system administrator defines outcomes that are mapped to system-defined progression outcomes. When an outcome is approved by the academic committee, the outcome changes the progression status of the student program attempt. For example, when a student fails a progression rule with an outcome of Suspension and this outcome has been approved by the relevant academic committee, the student progression status becomes **Suspension**.

System-defined progression outcomes include:

- Award: Confer a degree on the student

- Exclusion: Exclude student from enrolling into a program group, program, unit set or unit
- Expulsion: Expulsion from a program group
- Ex_fund: Exclude from awarding fund/disbursement fund
- Manual: Assign outcome manually to a student program attempt when it is necessary to apply outcomes on students regardless of progression rules
- No Penalty: A warning given with no associated penalty
- Probation: A restriction or requirement placed on student enrollment
- Repeatyr: Repeat the year
- Suspension: Suspension from a program

6.2.5 Program Completion

Students must complete all program and award requirements set by the academic body that oversees them. The administrator defines completion rules for each program. Faculty or designated personnel evaluate a student program attempt against these completion rules.

The following information is used to check the completion rule:

- A standard evaluation: This is based on the current status of the relevant student program attempt. During evaluation, only the students whose final results are entered are considered.
- A predictive evaluation: This is based on the assumption that all the enrolled unit attempts will be successfully completed. Student unit attempts without final results and a status of incomplete are also included.

6.2.6 Graduation

Graduation is the final stage in student academic career. A student must have successfully completed the program enrolled in to be eligible for graduation.

A graduation cycle is the period of activity ranging from preparation for the graduation of students to the follow-up activities after the ceremonies. The cycle involves the following:

- Identifying possible graduands: The graduation specialist identifies eligible graduands and creates graduand records.

- Assigning graduands to ceremonies: Graduands can be assigned to ceremonies even before graduand records are created.
- Corresponding with graduands: Graduands are informed either that they are eligible to graduate or will be able to graduate on meeting program completion requirements. They are also informed of the ceremony round to which they are assigned.

A *ceremony round* refers to a period of time when a set of graduation ceremonies is conducted. The term can also imply the preparatory events and processes leading up to the ceremony period itself. Each ceremony round is linked to one or more completion periods called ceremony round periods, in which the student is likely to complete program requirements.

- Granting approval to graduate: An administrative organizational unit or council approves graduand eligibility.
- Managing graduands: Graduands respond to the correspondence sent to them indicating their intention to either attend the graduation ceremony or receive in absentia. Graduands options can include the following:
 - a. Alternative exit: Where a student opts for a lower level of qualification than the one originally enrolled in. For example, a student enrolled in a Bachelor of Commerce program has the option to exit that program with a Diploma of Business Administration on satisfying the program completion requirements of the lesser degree.
 - b. Articulate an award: When a student opts to forgo an award or a degree to pursue a higher level of program, it is called *articulating an award*. For example, a student can forgo an undergraduate degree in commerce to continue directly into the masters program.
 - c. Defer an award: When a graduand wishes to postpone graduation, but the graduation specialist is unable to allocate the graduand to a future ceremony round.
 - d. Surrender an award: Before taking an award in the current round, a student is obliged to surrender a related previously conferred award. For example, a graduand accepting a Bachelor of Commerce with Honors surrenders the previous Bachelor of Commerce award.

Based on the graduand response, the graduation specialist updates the graduand records. Graduands are assigned a unique number that determines the order in which graduands will receive awards.

6.2.7 Degree Audit

Degree audit is an analysis of student progress toward meeting degree requirements. It evaluates current or expected program work against the requirements for degree award.

Degree audit performs the following:

- Program comparison: For students considering a change in their major, degree audit provides what-if scenarios to show how course work already completed can be applied to other potential majors and what other courses students need to complete.
- Transfer evaluation: When students transfer from one academic institution to another, a degree audit compares student credit points from the previous institution against the current institution's program completion requirements. The degree audit calculates and reports on the credit points required and identifies the units that the student can choose to meet the requirement.
- GPA calculation: Calculation of external GPA not supported by Oracle Student System. For example, special academic statistics such as Major or Minor GPA are calculated.
- Degree completion: Assess general student progress, provide assistance both in making degree completion decisions and identifying eligible graduands.

Oracle Student System uses a third party degree auditing software to perform the above tasks. The processed information is then transferred to Oracle Student System.

6.2.8 Order and Produce Documents

On program completion, students can order transcripts and enrollment certificates through self-service. The administrator can place bulk orders on behalf of students. Academic institutions can offer various transcript service plans. Students choose a plan in self-service and pay the appropriate charges. Students must pay document fees if they request documents beyond the limit of the transcript service plan chosen. They can also cancel plans if desired.

6.3 Evaluating Applications for Advanced Standing

6.3.1 Overview

When students transfer from one academic institution to another, they can apply for transfer of credits. The credits granted by the current institution for work done at the previous institution are called transfer credits or advanced standing.

The evaluation of advanced standing for a student depends on factors, such as the grades received, and prior courses or exams taken in relation to the current program.

Scenario

A student applies for advanced standing in a Bachelor of Business Administration program. Earlier, the student completed units in the first year of a computing degree in an external institution, but withdrew from the program. An assessment of the student application for advanced standing produces the following results:

- Unit Credit

The student is granted full credit for unit COM101 - Introduction to Computing. COM101 is entered with advanced standing type Credit, and granting status Approved.

The Granting Advanced Standing concurrent process identifies the student's program attempt with a status of Enrolled, and changes the status to Granted. For more information on Granting Advanced Standing concurrent process, see [Generating the Advanced Standing Granting Report](#).

- Partial Credit

The student has earned 3 credits in ACC105 from the external institution. Upon review, the registrar's office determines that the course requirements of ACC105 do not completely meet the requirements for ACC110 - Accounting Basics. The registrar approves 2 credits for ACC110.

- Preclusion

The student is precluded from the unit Introduction to Accounting since he studied accounts in his previous academic institution. Alternate units, such as Accounting 1A or Accounting 1B are offered as options to the student.

- Unit Level

The student is granted six credits of freshman-level accounting. Unit level advanced standing is granted when it is not possible to identify an equivalent unit for prior studies in the current program.

6.3.1.1 Advanced Standing Process

The process flow for advanced standing is as follows:

1. A student applies for advanced standing in a program of study and provides the required documentation.
2. The institution designates a responsible officer to assess the application.
3. The officer evaluates the application and assigns an advanced standing status of Approved.
4. The approved applications are entered in Oracle Student System.

6.3.2 Processing Advanced Standing

Advanced standing in Oracle Student System is used to evaluate and award advanced standing for previously completed units, exams, or qualifications.

Processing advanced standing includes the following tasks:

- [Creating Advanced Standing Records](#)
- [Viewing Previous Unit Details](#)
- [Entering Advanced Standing Unit Details for Previous Units](#)
- [Entering Advanced Standing Unit Level Details for Previous Units](#)
- [Viewing Previous Exam Details](#)
- [Entering Advanced Standing Unit Details for Previous Exams](#)
- [Entering Advanced Standing Unit Level Details for Previous Exams](#)
- [Viewing Previous Qualification Details](#)
- [Entering Advanced Standing Unit Level Details for Previous Qualification](#)
- [Processing Advanced Standing Eligibility](#)
- [Generating the Advanced Standing Granting Report](#)
- [Expiring Advanced Standing](#)
- [Generating the Advanced Standing Awarded Report\]](#)

Prerequisites

The following prerequisites are relevant for all the advanced standing tasks:

Advanced standing types are defined.

Advanced standing details with the expiration date increment are configured.

Academic history details are entered in the Direct Admissions window.

The student has a program attempt with a status of **Enrolled**, **Inactive**, **Intermit**, **Unconfirm**, or **Discontin**.

6.3.2.1 Creating Advanced Standing Records

The following steps outline how to create an advanced standing record for a person.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details

Steps

1. Query the person and select the relevant program attempt.
2. You can change the institution where the units under consideration were completed, if the default is incorrect.
3. Save your work.

6.3.2.2 Viewing Previous Unit Details

The following steps outline how to view previous unit details for a person.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details > Unit Articulation Details

Additional Notes

- Previous unit details are entered in the Academic History Details window. For information, see Admissions, [Entering Program Information](#).
- You can view the term in which the previous unit is completed, and the credit points and grades earned in the Previous Unit Details region.
- Enter unit and unit level advanced standing details as required.

For details, see [Entering Advanced Standing Unit Details for Previous Units](#) and [Entering Advanced Standing Unit Level Details for Previous Units](#).

6.3.2.3 Entering Advanced Standing Unit Details for Previous Units

Advanced standing is awarded for previously completed units.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details > Unit Articulation Details button > Unit Details

Steps

1. In the Unit Details tab, enter the required information. For more information on advanced standing statuses, see Guidelines in [Generating the Advanced Standing Granting Report](#).
2. In the Other Details tab, enter the following:
 - a. To change the date of expiration, select a date using the calendar.

The field displays a default date that is calculated using the value of Expiration Date Increment as specified in the Advanced Standing Configuration window. For more information, see *Oracle Student System Implementation and Administration Guide*.

The expiration date indicates the date after which the advanced standing status will be changed to **Expired** using the Expire Advanced Standing concurrent process. For information, see [Expiring Advanced Standing](#).
 - b. The Granted field is updated with the date on which advanced standing is granted.
 - c. Select the Program Grouped check box to indicate that the unit is owned by an organization other than the one that owns the program, but satisfies part of the program requirements.
 - d. Select the authorizer using the Find Person icon. The authorizer must have a person type of Staff.
 - e. Enter Comments and Last Year of Enrollment, if required.
 - f. Select the Program Type.
3. In the Alternate Units tab, enabled for Preclusion only, select the alternate units.

4. In the Grade Details tab, you select the Grading Schema and Grade from the list of values.
5. Save your work.

6.3.2.4 Entering Advanced Standing Unit Level Details for Previous Units

The following steps outline how to enter advanced standing for a unit level.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details > Unit Articulation Details button > Unit Level Details

Steps

1. In the Unit Level Details tab, enter the required information. For more information on advanced standing statuses, see Guidelines in [Generating the Advanced Standing Awarded Report](#).
2. In the Other Details tab, enter the following:
 - a. To change the date of expiration, select a date using the calendar.

The field displays a default date that is calculated using the value of Expiration Date Increment as specified in the Advanced Standing Configuration window. For more information, see *Oracle Student System Implementation and Administration Guide*.

The expiration date indicates the date after which the advanced standing status will be changed to Expired using the Expire Advanced Standing concurrent process. For information, see [Expiring Advanced Standing](#).
 - b. The Granted field is updated with the date on which advanced standing is granted.
 - c. Select the authorizer using the Find Person icon. The authorizer must have a person type of Staff.
 - d. Enter Comments and Last Year of Enrollment, if required.
 - e. Select the Program Type.
 - f. Save your work.

6.3.2.5 Viewing Previous Exam Details

The following steps outline how to view previous exam details.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details > Exam Articulation Details

Additional Notes

- The previous exam details are entered in the Admission Test Results window. For information, see Admissions, [Entering Admission Test Results](#).
- You can view the type of exam written, the date, and the score in the Admission Exam Details region.
- Select appropriate buttons to enter unit and unit level advanced standing details.

For details, see [Entering Advanced Standing Unit Details for Previous Exams](#) and [Entering Advanced Standing Unit Level Details for Previous Exams](#).

6.3.2.6 Entering Advanced Standing Unit Details for Previous Exams

Advanced standing is awarded for previous exams attended by the students.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details > Exam Articulation Details button > Unit Details

Additional Notes

The previous exam details are entered in the Admission Test Results window. For information, see [Entering Admission Test Results](#).

For more information, refer to [Entering Advanced Standing Unit Details for Previous Units](#).

6.3.2.7 Entering Advanced Standing Unit Level Details for Previous Exams

Unit level advanced standing is awarded for previous exams when it is not possible to identify an equivalent unit for prior exams in the current program.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details > Exam Articulation Details button > Unit Level Details

Additional Notes

The previous exam details are entered in the Admission Test Results window. For information, see [Entering Admission Test Results](#).

For details, refer to [Entering Advanced Standing Unit Level Details for Previous Units](#).

6.3.2.8 Viewing Previous Qualification Details

The following steps outline how to view previous qualification details.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details > Qualification Details

Additional Notes

- The previous qualification details are entered in the Qualification Details window. For information, see Admissions, [Entering Qualification Details](#).
- You can view the qualification, subject, year of qualification, results, and score in the Qualification Details region.
- Select Unit Level Details to enter unit level advanced standing details. For details, see [Entering Advanced Standing Unit Level Details for Previous Qualification](#).

6.3.2.9 Entering Advanced Standing Unit Level Details for Previous Qualification

Unit level advanced standing is awarded for previous qualification when it is not possible to identify an equivalent unit for previous qualification in the current program.

Navigation

Academic Records > Advanced Standing > Advanced Standing Details > Qualification Details button > Unit Level Details

Additional Notes

The previous qualification details are entered in the Qualification Details window. For more information, see Admissions, [Entering Qualification Details](#).

For details, refer to [Entering Advanced Standing Unit Level Details for Previous Units](#).

6.3.2.10 Processing Advanced Standing Eligibility

The Process Advanced Standing Eligibility concurrent process performs the following tasks:

- Updates the status of unit advanced standing records from Approved to Granted where the advanced standing type is Credit.
- Updates the status of unit level advanced standing records from Approved to Granted.
- Sets the Granted date to the current date.
- Performs a repeat validation to determine how many times a student can repeat the unit or unit sections.

Prerequisites

Advanced standing records exist.

Students have a program attempt with a status of Enrolled, Inactive, Intermit, Unconfirm, or Discontin.

The approved or granted advanced standing does not exceed the credit limit set for the program version in the Basic Program Details window.

Students do not have holds against their program attempts.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Additional Notes

- Run the Process Advanced Standing Eligibility concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- The Process Advanced Standing Eligibility concurrent process does not have parameters.
- Run this concurrent process nightly to identify records that require processing. It does not produce any reports, but writes successful updates and exceptions to the log file, which are retrieved by the Advanced Standing Granting Report.

6.3.2.11 Generating the Advanced Standing Granting Report

The Advanced Standing Granting Report concurrent process produces a report on advanced standing granted and not granted.

The administrator can run this concurrent process for selected combinations of program code, program status, and person IDs.

Prerequisites

Advanced standing records exist.

Students have a program attempt with a status of **Enrolled**, **Inactive**, **Intermit**, **Unconfirm**, or **Discontin**.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Advanced Standing Granting Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Advanced Standing Granting Report concurrent process:

Table 6–1 Advanced Standing Granting Report Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report.
Log Record(s) Creation Date	Select the log record creation date.
Include Records From Log Table	Enter Yes to select only those records from the Log Table. Enter No to select all advanced standing records
Program Code	Select the program code.
Program Status	Enter the status of program.
Person Number(s)	Enter the number identifying the person.
Report Exceptions only	Enter Yes or No .

6.3.2.12 Expiring Advanced Standing

The Expire Advanced Standing concurrent process resets the status of an advanced standing unit or unit level record to **Expired** when advanced standing is approved after the specified expiration date.

Prerequisites

For details, see prerequisites for [Generating the Advanced Standing Granting Report](#).

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Additional Notes

- Run the Expire Advanced Standing concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- This process does not have any parameters.
- The administrator can run this concurrent process nightly after the Process Advanced Standing Eligibility concurrent process. The run log records the number of applications that are expired.

6.3.2.13 Generating the Advanced Standing Awarded Report

The Advanced Standing Awarded concurrent process generates a report of advanced standing awarded with the following details:

- The previous unit, number, description, credit points, and grade
- The exam type, description, score and date taken
- The advanced standing unit or unit level, title, award type, percentage, credit points, award status, and comments

Prerequisites

For details, see prerequisites for [Generating the Advanced Standing Granting Report](#).

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Advanced Standing Awarded concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Advanced Standing Awarded concurrent process:

Table 6–2 Advanced Standing Awarded Parameters

Parameter	Description
Person Number(s)	Select the number identifying a person
Approved Date	Enter the date on which advanced standing has been approved
Granted Date	Enter the date on which advanced standing has been granted
Advanced Standing Type	Enter the type Credit, Exemption, or Preclusion

Guidelines

A student can have the following advanced standing statuses:

- **Approved:** Advanced standing application evaluated and accepted.
- **Granted:** Advanced standing applied to student program attempt.
- **Canceled:** Request for advanced standing withdrawn by the student.
- **Revoked:** Advanced standing withdrawn by the institution.
- **Expired:** Advanced standing has not been granted before the date of expiry.

6.4 Assessing a Unit Attempt

6.4.1 Overview

Assessment in Oracle Student System includes the following functions:

- Recording and maintaining assessment items, grading schema, and related details
- Managing all examination functions such as timetables, examination materials, examination supervision, and examination locations and venues

- Managing critical assessment-related calendars and dates
- Entering and publishing results
- Generating assessment-related correspondence
- Entering and managing assignments, assignment due date extensions, and assignment outcomes
- Managing applications for special consideration and their outcomes

While assessing unit attempts, you can perform the following tasks:

- [Managing Assessment Items](#)
- [Approving Applications for Special Consideration](#)
- [Grading](#)
- [Managing Examinations](#)

6.4.2 Managing Assessment Items

Managing assessment items involves the following tasks:

- [Automatically Maintaining Student Unit Attempt Assessment Items](#)
- [Modifying Unit Assessment Items](#)
- [Manually Assigning Assessment Items](#)

6.4.2.1 Automatically Maintaining Student Unit Attempt Assessment Items

For information, see *Oracle Student System Implementation and Administration Guide*.

6.4.2.2 Modifying Unit Assessment Items

For information, see *Oracle Student System Implementation and Administration Guide*.

6.4.2.3 Manually Assigning Assessment Items

For information, see *Oracle Student System Implementation and Administration Guide*.

6.4.3 Approving Applications for Special Consideration

Approving applications for special consideration involves the following tasks:

- [Entering Special Consideration Application Details](#)

- [Applications for Special Consideration in Assessment](#)
- [Listing Special Consideration Outcome Applications](#)

6.4.3.1 Entering Special Consideration Application Details

Students can apply for special consideration if circumstances have prevented them from completing an assessment item or have adversely affected their performance. Examples include family emergencies, work pressures, or illness. Institutions review these applications and assign final outcomes.

Prerequisites

Assessment items, types, and assessor types are defined.

Assessment calendar is configured.

Grading schema is defined. Mark and grade entry is configured.

Special consideration categories and outcomes are defined.

Navigation

Academic Records > Assessments > Special Consideration Application Details

Steps

1. Query the person number to enter special consideration application details.
2. Click the Default Application Detail icon to enter application details and outcome sought.

You can enter special consideration applications only for confirmed and enrolled student unit attempts, and not for discontinued, wait listed, and dropped student unit attempts.

3. Optionally, enter the application details, sought outcome, and actual outcome.
The sought outcome is what the student expects. The actual outcome is what the assessor assigns after evaluation of the application
4. Save your work. The Application Tracking ID is automatically generated.
5. Click **Other Assessment Item Details** to view details of other assessment items if any.

6.4.3.2 Applications for Special Consideration in Assessment

Run the Applications for Special Consideration in Assessment concurrent process for details of students who have applied for special consideration but are awaiting an outcome. It helps the unit coordinator or unit contact responsible in deciding whether or not to grant special consideration.

The Applications for Special Consideration in Assessment concurrent process is run by an Assessments specialist during assessment periods or as required.

Prerequisites

Applications for special consideration exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Applications for Special Consideration in Assessment concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Applications for Special Consideration in Assessment concurrent process.

Table 6–3 Applications for Special Consideration in Assessment Parameters

Parameter	Description
Run Time Comment	Enter the comment that appears on header page of report
Assessment Period	Select the assessment period. This field is mandatory.
Teaching Period	Select the teaching period.
Owning Organizational Unit	Select the owning organizational unit.
Unit Code	Select the unit code.
Unit Location	Select the place in which institution conducts business or holds classes.

Table 6–3 (Cont.) Applications for Special Consideration in Assessment Parameters

Parameter	Description
Unit Mode	Select the attendance mode.
Unit Class	Select the high level day and time indicator or unit section number.
Application Receiving Start Date	Enter start date from which applications are considered. Each time a report is run, it selects applications created after a previous run, unless another date is specified in this field. Note: If this report is run twice on the same day, changes made after the first run are not reflected.
Application Receiving End Date	Enter the end date for receiving applications.
Include Unit Coordinators/Unit Contacts	Specify whether unit contact, unit coordinator, or both appear on each page of report.
Unit Coordinator/Contact Address Type	Select the address type of unit coordinator or contact.
Message 1 - General Instructions/Information	Select the general instructions and information that appear on the front page of the report.
Message 2 - Outcome Notes	Select the outcome notes that appear on the front page of the report
Message 3 - General Instructions/Information	Select the additional general instructions and information that appear below unit contact or unit coordinator details in the report's body.
Unit Coordinator Title	Enter the title of the unit coordinator. It appears at the bottom of each page in report.
Chair of Board of Examiners Title	Enter the chair of Board of Examiners title. It appears at the bottom of each page in the report.

6.4.3.3 Listing Special Consideration Outcome Applications

Run the Special Consideration Outcome Report concurrent process for details about students who apply for special consideration and the status of their applications. It is used to manage special consideration applications or to send to organizational units for information.

Details include student unit attempt and assessment item involved, recorded outcomes, and application-related dates. Special consideration applications for

assessment items linked to discontinued student unit attempts and student program attempts are also displayed.

Prerequisites

Applications for special consideration exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Special Consideration Outcome Report concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Special Consideration Outcome Report concurrent process.

Table 6–4 *Special Consideration Outcome Report Parameters*

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report.
Assessment Period	Select the assessment period. This is a mandatory parameter.
Teaching Period	Select the teaching period.
Parent Organizational Unit	Select the parent organizational unit.
Unit Owning Organizational Unit	Select the unit owning organizational unit.
Unit Code	Select the unit code.
Unit Location	Select the place in which the institution conducts business or holds classes.
Unit Class	Select the high-level day and time indicator or unit section number.
Person Number	Select the person number.

Table 6–4 (Cont.) Special Consideration Outcome Report Parameters

Parameter	Description
Applications Keyed Since Date	Enter the date from which applications are keyed. Only applications entered after this date are reported.
Application Status	Enter the application status. It can be Finalized , Unfinalized , or Both .
Include Keys to Categories/Outcomes	If selected, includes keys to categories and outcomes, which are printed after each owning organizational unit.
Report Sort Options	Select the report sort option.

6.4.4 Grading

Students are graded for a unit or for a particular assessment item in a grading period.

The process of grading involves the following tasks:

- [Maintaining Anonymous ID](#)
- [Initiating Tracking Items for Assignments](#)
- [Producing Student Assignment Cover Sheet](#)
- [Summarizing Assignment Due Dates](#)
- [Generating Assessment Notifications](#)
- [Importing Assessment Item Outcomes](#)
- [Generating a Report on Outcome Import Failure](#)
- [Grading Unit Attempt Outcomes](#)
- [Assigning Grades to Non-enrolled Student Unit Attempt Outcomes](#)
- [Generating a Report on Non-enrolled Student Outcomes](#)
- [Importing Grades](#)
- [Generating a Report on Invalid Grades](#)
- [Identifying Incomplete Grades](#)
- [Generating a Report on Grade Import Failure](#)
- [Unit Review Report](#)
- [Identifying Outcomes for Display](#)

- [Assigning Administrative Grades](#)
- [Releasing Unit Section Grades to Students](#)

6.4.4.1 Maintaining Anonymous ID

Run the Maintain Anonymous ID concurrent process to generate anonymous IDs for programs, units, and persons within a specified range.

Prerequisites

Load calendar is defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Maintain Anonymous ID concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Maintain Anonymous ID concurrent process.

Table 6–5 Maintain Anonymous IDs Parameters

Parameter	Description
Load Calendar	Select the load calendar for which anonymous IDs are to be generated.
Minimum limit of Range	Enter the minimum limit of number range from which anonymous IDs are to be generated.
Maximum limit of Range	Enter the maximum limit of number range from which anonymous IDs are to be generated.
Reallocate Anonymous ID	Enter Yes or No . Yes indicates that existing anonymous IDs are to be deleted and new anonymous IDs are to be allocated; No indicates that existing anonymous IDs are to be retained.

6.4.4.2 Initiating Tracking Items for Assignments

Run the Initiate Tracking Items for Assignments concurrent process to create tracking items for student unit attempt assessment items. Tracking items inherit institution-defined tracking steps from their tracking type.

To run this process, you must enter the academic calendar, student, tracking type, tracking status, and tracking originator.

The tracking type and tracking items can have steps not mapped to the system-defined steps.

Prerequisites

Assessment items for student unit attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Initiate Tracking Items for Assignments concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Initiate Tracking Items for Assignments concurrent process.

Table 6–6 Initiate Tracking Items For Assignments Parameters

Parameter	Description
Select Either Previous Run Date	If selected, previous exception report is duplicated without further processing and all other parameters are ignored.
Or a Combination of (Runtime Comment	Enter the comment that appears on header page of report.
Academic Calendar	Select the academic calendar. This is a mandatory parameter.
Teaching Calendar	Select the teaching calendar.
Program Code	Select the program code.
Unit Code	Select the unit code.

Table 6–6 (Cont.) Initiate Tracking Items For Assignments Parameters

Parameter	Description
Unit Location	Select the place in which institution conducts business or holds classes.
Unit Mode	Select the mode of attendance.
Unit Class	Select the high level day and time indicator or unit section number.
Student	Select the student ID. This is a mandatory parameter.
Assessment ID	Select the system-generated number that uniquely identifies assessment ID.
Tracking Type	Select the tracking type mapped to system-defined tracking type of Assignment. This is a mandatory parameter.
Tracking Status	Select the institution-defined tracking status mapped to system-defined tracking status Active . This is a mandatory parameter.
Tracking Start Date	Enter the tracking start date. This is assigned to each tracking item created by the concurrent process.
Tracking Originator	Select the identifying number of the person who created the tracking item. This is a mandatory parameter.

6.4.4.3 Producing Student Assignment Cover Sheet

The Produce Student Assignment Cover Sheet concurrent process creates an extract file with records that enable the printing of cover sheets for student assignments to be tracked, and a correspondence item record for each cover sheet.

This concurrent process is run as required. Parameters set in the Initiate Tracking Items For Assignments concurrent process become the default parameters for the Produce Student Assignment Cover Sheet concurrent process, and cannot be changed.

Prerequisites

Assessment items exists for student unit attempts.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Produce Student Assignment Cover Sheet concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Produce Student Assignment Cover Sheet concurrent process.

Table 6–7 Produce Student Assignment Cover Sheet Parameters

Parameter	Description
Academic Calendar	Select the academic calendar.
Teaching Calendar	Select the teaching calendar.
Program Code	Select the program code.
Unit Code	Select the unit code.
Unit Location	Select the unit location.
Unit Mode	Select the mode of attendance.
Unit Class	Select the high level day and time indicator or unit section number.
Person	Select the person.
Assessment Item ID	Select the system-generated number identifying assessment item.

6.4.4.4 Summarizing Assignment Due Dates

Run the Assignment Due Date Summary Report concurrent process to summarize assignments due and received for a specific assessment period or teaching period.

This concurrent process is run by an assessments or assignment specialist at the beginning of a teaching period, or as required, but no more than once per week during a period in which assignments are due.

Prerequisites

Student assignments exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Assignment Due Date Summary Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Assignment Due Date Summary Report concurrent process.

Table 6–8 Assignment Due Date Summary Report Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on header page of report.
Assessment Calendar	Enter the assessment calendar.
Owning Organizational Unit	Select the organizational unit that owns the assignment or assignments.
Mode	Select the attendance mode.
Format	Enter the format of the report. It can be high level or low level.

6.4.4.5 Generating Assessment Notifications

The Generate Assessment Notifications concurrent process generates notifications for different phases of grade and attendance recording. For the various notifications sent, offset values must be specified. The notifications are sent as many days before the date identified by the Date Alias.

Prerequisites

Assessment date aliases are associated using the Configure Assessment Calendar window.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Generate Assessment Notifications concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Generate Assessment Notifications concurrent process.

Table 6–9 Generate Assessment Notifications Parameters

Parameter	Description
Load Calendar	Select the load calendar for which notification offset days are to be specified. This is a mandatory parameter.
Attendance Submission Advanced Notification Offset Days	Enter the offset days for sending advance notification regarding attendance submission.
Attendance Submission Start Notification Offset Days	Enter the offset days for sending notification regarding attendance submission after the start date.
Attendance Submission End Notification Offset Days	Enter the offset days for sending notification regarding attendance submission after the end date.
Mid Term Grading Submission Advanced Notification Offset Days	Enter the offset days for sending advance notification regarding mid-term grading submission.
Mid Term Grading Submission Start Notification Offset Days	Enter the offset days for sending notification regarding mid-term grading submission after the start date.
Mid Term Grading Submission End Notification Offset Days	Enter the offset days for sending notification regarding mid-term grading submission after the end date.
Early Final Grading Sub Adv Notification Offset Days	Enter the offset days for sending advance notification regarding early final grading submission.
Early Final Grading Sub Start Notification Offset Days	Enter the offset days for sending notification regarding early final grading submission after the start date.
Early Final Grading Sub End Notification Offset Days	Enter the offset days for sending notification regarding early final grading submission after the end date.

Table 6–9 Generate Assessment Notifications Parameters

Parameter	Description
Final Grading Submission Advanced Notification Offset Days	Enter the offset days for sending advance notification regarding final grading submission.
Final Grading Submission Start Notification Offset Days	Enter the offset days for sending notification regarding final grading submission after the start date.
Final Grading Submission End Notification Offset Days	Enter the offset days for sending notification regarding final grading submission after the end date.

6.4.4.6 Importing Assessment Item Outcomes

Assessment outcomes entered in a spreadsheet must be converted into an interface table, and then imported into Oracle Student System through this process. The Assessment Item Outcome Upload and Validation Process concurrent process enables users to import outcomes from an interface table.

This concurrent process checks the records of the interface table for Alternate Code, Calendar Type, Calendar Instance Sequence Number, Person ID, and Assessment ID. The record fails the validation if data is missing.

Assessment item outcome records which fail the validation and cannot be uploaded by this process are reported by the Assessment Item Outcome Exception Report concurrent process.

This concurrent process is initiated by Oracle Student System at the time of updating student unit attempt item outcomes through WEB ADI. WEB ADI is a functionality that allows the instructor to download information into an Excel spreadsheet. The instructor then enters grades/marks for the students and uploads the spreadsheet back into Oracle Student System.

Prerequisites

Assessment item outcomes exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Assessment Item Outcome Upload and Validation Process concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Assessment Item Outcome Upload and Validation Process concurrent process.

Table 6–10 Assessment Item Outcome Upload and Validation Process Parameters

Parameter	Description
User ID	Select the login ID of the user running the process. This is a mandatory parameter.
Batch Date	Select the date of creating records in the interface tables.
Grade Creation Method	Select the method of grade creation. This is a mandatory parameter.
Delete Rows	Select Yes or No . If you select Yes , the rows in the interface table which are successfully uploaded into the Oracle Student System are deleted. This is a mandatory parameter.

6.4.4.7 Generating a Report on Outcome Import Failure

The Assessment Item Outcome Upload and Validation Process concurrent process is used to import assessment item outcomes from an interface table. The Assessment Item Outcome Exception Report concurrent process reports those records which fail the validation and cannot be uploaded into Oracle Student System.

This concurrent process is initiated by Oracle Student System at the time of updating student unit attempt item outcomes through WEB ADI.

Prerequisites

Assessment Item Outcome Upload and Validation Process concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Assessment Item Outcome Exception Report concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Assessment Item Outcome Exception Report concurrent process.

Table 6–11 Assessment Item Outcome Exception Report Parameters

Parameter	Description
User ID	Select the login ID of the user running the process. This is a mandatory parameter.
Batch Date	Select the date of creating records in the interface tables.
Delete Rows	Select Yes or No . If you select Yes , the rows in the interface table which are successfully uploaded into the Oracle Student System are deleted. This is a mandatory parameter.

6.4.4.8 Grading Unit Attempt Outcomes

The following steps outline how to manually assign grades to student unit attempts and derive student unit attempt marks from assessment item marks.

You can also change existing marks and grades for a unit attempt and finalize them.

Prerequisites

Unit attempt has a status of **Enrolled**, **Discontinued**, or **Completed**.

The assessment item and the default unit section grading schema have a valid mark range.

Navigation

Academic Records > Assessment > Student Unit Attempt Outcomes

Steps

1. Query the relevant person number to assign grades to student unit attempts.
2. Click **Derive Mark** to derive the mark for the student unit attempt outcome based on the student assessment item outcomes.

The Derive Mark button is enabled only if the Derive Unit Grades from Assessment item Grades check box is selected in the Mark/Grade Entry Configuration window.

You can use Student Unit Assessment Items button to view unit assessment item outcomes.

Student unit attempt marks are derived from assessment item marks only if the unit section is not marked as submitted and the Manually Overridden check box is deselected.

3. Select Manually Overridden check box to override the automatically calculated marks.
4. Enter or change the mark and select the relevant grade for it. The translated grade, if any, is displayed.
5. The Mark Capped check box indicates that the student unit attempt outcome is limited to a certain maximum mark.

This happens when a student reattempts to pass a unit. This functionality is prevalent in UK and Australia.

6. You can finalize the outcome by selecting the Finalized check box.
7. Save your work.
8. You can view the history of the outcomes in the Student Unit Attempt Outcome History window, which can be accessed as follows:

Requests > Enrollment History > Student Unit Attempt Outcome

6.4.4.9 Assigning Grades to Non-enrolled Student Unit Attempt Outcomes

You can assign outcomes to non-enrolled unit attempts, where a student is enrolled in a unit offering option, with a different combination of location, attendance mode, or attendance type.

Prerequisites

Student details exist in Oracle Student System.

Navigation

Academic Records > Assessments > Non Enrolled Student Outcomes

Additional Notes

Select person number and unit code in Non Enrolled Student Outcomes window to assign grade or mark to student unit attempt. Save your work.

6.4.4.10 Generating a Report on Non-enrolled Student Outcomes

The Non-enrolled Student Outcomes Report concurrent process provides details of outcomes for non-enrolled students in an assessment period, or a subset of non-enrolled students in a selected period of time, for example, since the concurrent process was last run.

This concurrent process is run by an Assessments specialist when processing assessment results.

The report lists student, program, and unit details for the appropriate outcome. Administrators use this information to resolve non-enrolled student outcomes. A check box in the Non-Enrolled Student Outcomes window is selected to indicate that a non-enrolled student outcome is resolved.

If a student with a non-enrolled student outcome is enrolled in the unit in the same teaching period, details of the actual unit attempt are displayed in the report. If the student is not enrolled, the value Unknown appears in the Location, Class, and Status fields.

Prerequisites

Non-enrolled students exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Non-enrolled Student Outcomes Report concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Non-enrolled Student Outcomes Report concurrent process.

Table 6–12 Non-enrolled Student Outcomes Report Parameters

Parameter	Description
Run Time Comment	Enter comment that appears on the header page of the report.
Assessment Calendar	Select the assessment calendar. This is a mandatory parameter.
Teaching Period	Select the teaching period.
Owning Organizational Unit	Select the owning organizational unit.
Unit Code	Select the unit code.
Unit Location	Select the unit location.
Unit Mode	Select the unit attendance mode.
Unit Class	Select the high level day and time indicator or unit section number.
Which Non Enrolled Outcomes	Enter the type of non enrolled outcomes to be included. The outcomes can be Unresolved Only , Resolved Only , or All Indexes .
Creation Method	Select the method of outcome creation.
Start Update Period	Enter the start date from which records are considered for report.
End Update Period	Enter the end date until which records are considered for report.

6.4.4.11 Importing Grades

Grading period grades entered in a spreadsheet must be converted into an interface table, and then imported into Oracle Student System. The Grading Period Grade Upload and Validation Process concurrent process enables users to import grading period grades from an interface table.

The concurrent process checks the records of the interface table for Alternate Code, Calendar Type, Calendar Instance Sequence Number, Person ID, and Calendar Instance Start and End Dates. The record fails the validation if data is missing.

Records that fail validation are reported by the Unit Grade Exception Report concurrent process.

This concurrent process is initiated by Oracle Student System at the time of updating student unit attempt item outcomes through WEB ADI.

Prerequisites

Grades exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Grading Period Grade Upload and Validation Process concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Grading Period Grade Upload and Validation Process concurrent process.

Table 6–13 Grading Period Grade Upload and Validation Process Parameters

Parameter	Description
User ID	Select the login ID of the user running the process. This is a mandatory parameter.
Batch Date	Select the date of creating records in the interface tables.
Grade Creation Method	Select the method of grade creation. This is a mandatory parameter.
Delete Rows	Select Yes or No . If you select Yes , the rows in the interface table which are successfully uploaded into the Oracle Student System are deleted. This is a mandatory parameter.

6.4.4.12 Generating a Report on Invalid Grades

The Invalid Grade Report concurrent process identifies student unit attempt outcomes with grades outside the mark range specified in the grading schema. An institution decides whether or not to allow invalid grades to be finalized and published.

This process is run by an Assessments specialist when processing results at the end of assessment periods, or as required.

This concurrent process is initiated by Oracle Student System at the time of updating student unit attempt item outcomes through WEB ADI.

Prerequisites

Student unit attempt outcomes exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Invalid Grade Report concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Invalid Grade Report concurrent process.

Table 6–14 Invalid Grade Report Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report
Assessment Period	Select the assessment period. This is a mandatory parameter.
Teaching Period	Select the teaching period.
Organizational Unit	Select the organization unit.
Unit Code	Select the unit code.
Unit Location	Select the unit location.
Unit Mode	Select the attendance mode.
Unit Class	Select the high level day and time indicator or unit section number.
Unfinalized Only	Select the type of invalid grades to be considered. It can be Unfinalized grades only or Finalized grades only .
Grade Creation Method	Select the method of grade creation.

Table 6–14 Invalid Grade Report Parameters

Parameter	Description
Outcome Creation From Date	Enter outcome creation start date. The process selects outcomes recorded after this date.
Outcome Creation End Date	Enter outcome creation end date. The process selects outcomes recorded before this date.

6.4.4.13 Identifying Incomplete Grades

Incomplete grades are assigned when a substantial portion of the program work has not been entirely completed. In such cases, a default grade is assigned before a specified date.

The Incomplete Grade Process concurrent process is run to identify incomplete grades and assigns a default grade if the deadline to assign grades expired.

Prerequisites

Student unit attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Additional Notes

Run the Incomplete Grade Process concurrent process. For information on running a concurrent process, see [Concurrent Process Procedures](#).

There are no parameters for this concurrent process.

6.4.4.14 Generating a Report on Grade Import Failure

The Grading Period Grade Upload and Validation Process concurrent process enables you to import grades from an interface table. The Unit Grading Exception Report concurrent process reports those records which fail the validation and cannot be uploaded into Oracle Student System.

Prerequisites

Grading Period Grade Upload and Validation Process concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Unit Grading Exception Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Unit Grading Exception Report concurrent process.

Table 6–15 Unit Grading Exception Report Parameters

Parameter	Description
User ID	Select the login ID of the user running the process.
Batch Date	Select the date of creating records in the interface tables.
Delete Rows	Select Yes or No . If you select Yes , the rows in the interface table which are successfully uploaded into the Oracle Student System are deleted. This is a mandatory parameter.

6.4.4.15 Unit Review Report

The Unit Review Report concurrent process displays recommended marks and grades, finalized marks and grades, or both to enable an institution’s Board of Examiners to identify outcomes to be amended.

You can also run this concurrent process during the cleanup process for all finalized but incomplete results. This concurrent process is run by an Assessments specialist throughout an assessment period, or as required.

Prerequisites

Student unit attempts with marks and grades exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Unit Review Report concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Unit Review Report concurrent process.

Table 6–16 Unit Review Report Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report.
Assessment Period	Select the assessment period.
Teaching Period	Select the teaching period.
Owning Organizational Unit	Select the owning organizational unit.
Include Child Organizational Unit	Enter Yes or No . If Yes , the child organizational units are included in report. If No , only top-level owning organizational units are displayed.
Chair of Examination Board Name Label	Enter the chair of Examination Board name label.
Chair of Examination Board Signature Label	Enter the chair of Examination Board signature label.
Chair of Assessment Panel Name Label	Enter the chair of assessment panel name label.
Chair of Assessment Panel Signature Label	Enter the chair of assessment panel signature label.
Unit Code	Select the unit code.
Unit Location	Select the unit location.
Unit Mode	Select the mode of attendance.
Unit Class	Select the high level day and time indicator or unit section number.
Grade Type	Select the grade type to include Recommended and Finalized grades or Recommended grades only.

Table 6–16 (Cont.) Unit Review Report Parameters

Parameter	Description
System Result Type	Select the predefined result type.
GRADE1	Enter Grade1.
GRADE2	Enter Grade2.
GRADE3	Enter Grade3.
GRADE4	Enter Grade4.
Sort By	Select the sort by method.

6.4.4.16 Identifying Outcomes for Display

The Unit Attempt Outcome Noticeboard Report concurrent process produces a list of student unit attempt outcomes for display on notice boards. It provides maximum flexibility with several sort of combinations.

Prerequisites

Student unit attempt outcomes exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Unit Attempt Outcome Noticeboard Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Unit Attempt Outcome Noticeboard Report concurrent process.

Table 6–17 Unit Attempt Outcome Noticeboard Report Parameters

Parameter	Description
Run Time Comment	Enter the comment that appears on the header page of the report.

Table 6–17 (Cont.) Unit Attempt Outcome Noticeboard Report Parameters

Parameter	Description
Assessment Calendar	Select the assessment calendar. This is a mandatory parameter.
Teaching Period	Select the teaching period.
Program Responsible Organization Unit	Select the responsible organizational unit.
Program Group	Select the program collection with common institution-defined properties.
Program Code	Select the program code.
Program Location	Select the program location. Selects all students with matching program location. Includes all enrolled units regardless of unit location.
Program Mode	Select the program attendance mode. Selects all students with matching program mode. Includes all enrolled units in program regardless of unit mode.
Unit Code	Select the unit code.
Unit Location	Select the unit location.
Unit Mode	Select the unit attendance mode.
Unit Class	Select the high level day and time indicator or unit section number.
Include Marks	Enter Yes or No . If Yes , the report includes marks.
Sort By	Select the sort by method.

6.4.4.17 Assigning Administrative Grades

The Insert Administrative Grades concurrent process inserts default or specified administrative grades for student unit attempts that are not assessable, such as audit enrollments, or those that lack a recorded outcome.

This concurrent process is run by an Assessments specialist before unit results are released, to prevent blank grades on results publications or as required.

Prerequisites

Student unit attempts exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Insert Administrative Grades concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Insert Administrative Grades concurrent process.

Table 6–18 Insert Administrative Grades Parameters

Parameter	Description
Assessment Calendar	Select the assessment calendar.
Teaching Calendar	Select the teaching calendar.
Owning Organizational Unit	Select the owning organizational unit.
Unit Code	Select the unit code.
Unit Location	Select the place in which institution conducts business or holds classes.
Unit Mode	Select the unit attendance mode.
Unit Class	Select the high level day and time indicator or unit section number.
Insert Default from Grading Schema	Enter Yes or No . If Yes , inserts default outstanding grade specified in relevant grading schema.
Grade to Insert	Select the grade to insert instead of the default outstanding grade specified in grading schema. This parameter is mandatory when Insert Default from Grading Schema check box is not selected.

Table 6–18 Insert Administrative Grades Parameters

Parameter	Description
Insert Outcomes as Finalized	Enter Yes or No . If Yes , inserts grades as finalized.
Assessable Units	Select units that are Assessable Only , Non Assessable Only , or All .
Non Assessed Students	Select the type of students to be processed. You can choose from Assessed Students Only , Non-Assessed Students Only , or All .

6.4.4.18 Releasing Unit Section Grades to Students

Run the Release Unit Section Grades to Students concurrent process to insert grade release date and time against student unit attempts.

Prerequisites

Student unit attempts with a status of **Enrolled**, **Discontinued**, or **Completed** exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Release Unit Section Grades to Students concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Release Unit Section Grades to Students concurrent process.

Table 6–19 Release Unit Section Grades to Students Parameters

Parameter	Description
Teaching Calendar	Enter the teaching calendar.
Person ID Group	Select the person ID group.
Owning Organizational Unit	Select the owning organizational unit.

Table 6–19 (Cont.) Release Unit Section Grades to Students Parameters

Parameter	Description
Unit Code	Select the unit code.
Location	Select the location.
Unit Mode	Select the unit mode of attendance.
Unit Class	Select the day and time when the unit is offered.
Unit Section	Select the unit section.
Call Number	Select the call number.
Grading Period	Select the grading period.
Student Number	Select the student number.
Default Release Date to Insert	Enter the default grade release date.
Default Release Time to Insert	Enter the default grade release time.
Overwrite Existing Release Date & Time Y/N	Select Yes or No .

6.4.5 Managing Examinations

Managing examinations has the following tasks:

- [Generating a Report on Examinations to be Scheduled](#)
- [Generating Exam Attendance Rolls](#)
- [Managing Venue Session Availability](#)
- [Generating Seating Allocation Report](#)
- [Entering Student Examination Details](#)
- [Producing Exam Supervisor Labels](#)
- [Producing Examination Packaging Labels](#)
- [Producing Result Sheets](#)
- [Tracking Result Sheets](#)
- [Generating Examination Schedule Report](#)

6.4.5.1 Generating a Report on Examinations to be Scheduled

The Required Examinations Report concurrent process provides details of examinations to be scheduled during an examination period. This concurrent process is used primarily by educational institutions that do not use the examination timetabling functionality to schedule examinations.

Prerequisites

Examination period is defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Required Examinations Report concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Required Examinations Report concurrent process.

Table 6–20 Required Examinations Report Parameters

Parameter	Description
Run Time Comment	Enter the comment that appears on the header page of the report.
Examination Period	Select the examination period. This is a mandatory parameter.
Teaching Period	Select the teaching period.
Owning Organizational Unit	Select the owning organizational unit.
Unit Code	Select the unit code.
Unit Mode	Select the unit attendance mode.
Unit Location	Select the code of location owned or used by institution.

Table 6–20 Required Examinations Report Parameters

Parameter	Description
Examination Responsibility	Select the type of examination responsibility. You can choose from Central Only , Non-Central Only , or Both Central and Non-Central .
Sort By	Select the sort by method.
Text File	Enter Yes or No . If you enter Yes , a comma-delimited text file of report is produced. This requires an output directory to be specified in the profile against Concurrent:Directory for Copy. If no directory is specified, the process returns an error.

6.4.5.2 Generating Exam Attendance Rolls

The Exam Attendance Rolls concurrent process produces a list of students expected to attend a specific examination venue and session. Examination supervisors use these lists to record student attendance and comments about students.

Prerequisites

Examination venues and sessions are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Exam Attendance Rolls concurrent process.

 For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Exam Attendance Rolls concurrent process.

Table 6–21 Exam Attendance Rolls Parameters

Parameter	Description
Run Time Comment	Enter the comment that appears on header page of report.
Examination Calendar	Select the examination calendar.

Table 6–21 (Cont.) Exam Attendance Rolls Parameters

Parameter	Description
Centrally Managed Examinations Only	Select the type of examinations to be considered. You can choose from Central Only , Non-Central Only , or Both Central and Non-Central .
Unit Code	Select the unit code.
Assessment Item	Select the assessment item student is required to complete for unit.
Internal and External Locations	Select the type of exam location. You can choose from External Location Only , Internal Location Only , or Internal and External Locations .
Examination Location	Select the examination location.
Examination Venue	Select the examination venue.
Examination Date	Select the examination date.
Examination Session	Enter the examination session.
Report Sort Options	Select the report sort option.
Report Body Sort Options	Select the report body sort option. You can choose from Sort By Person ID , Sort By Seat Number , or Sort By Surname/Given Name .

6.4.5.3 Managing Venue Session Availability

Educational institutions correspond with examination location coordinators to determine the availability of venues within one or more examination periods. You can create availability records for open venues for sessions within an examination period using the following:

- Venue Session Availability Window
- Default Examination Venue Session Availability Concurrent Process

The Default Examination Venue Session Availability concurrent process is run by an Assessments specialist before creating an examination timetable, or as required.

Prerequisites

Examination venues and sessions are defined.

Examination period is defined.

Navigation

Academic Records > Assessment > Setup > Examination Timetable > Venue Session Availability

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Click **Default Sessions** in the Venue Session Availability window to create availability records for individual venues for every session. If specific venues are unavailable for any session, the relevant records are deleted. The **Default Sessions** button allocates a particular venue to all sessions within an examination period.

You can also manually delete the records, if venues are unavailable during the examination period, or if sessions are not required at a venue. For more information on Venue Session Availability, see *Oracle Student System Implementation and Administration Guide*.

2. Optionally, run the Default Examination Venue Session Availability concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

This concurrent process has a single parameter, Examination Calendar. Select the examination calendar for which the process is to be run. This is a mandatory parameter.

6.4.5.4 Generating Seating Allocation Report

The Seating Allocation Report concurrent process provides details of seats allocated to students at examination venues. It is used to inform students about their examination locations and enable supervisors to seat students correctly, in conjunction with the Exam Attendance Rolls concurrent process.

The Seating Allocation Report concurrent process is run by an Assessments specialist before and during examination periods.

Prerequisites

Examination venues are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Seating Allocation Report concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Seating Allocation Report concurrent process.

Table 6–22 Seating Allocation Report Parameters

Parameter	Description
Run Time Comment	Enter the comment that appears on the header page of the report.
Examination Calendar	Select the examination calendar. This is a mandatory parameter.
Examination Location	Select the examination location.
Examination Venue	Select the examination venue.
Examination Date	Select the examination date.
Examination Session	Select the examination session.
Unit Code	Select the unit code.
Display Options	Select the type of person details to be displayed You can choose from Person ID and Surname , Person ID only , or Surname only .
Report Sort Options	Select the report sort option.

6.4.5.5 Entering Student Examination Details

You can enter examination attendance details, override student seat numbers, and create examination time slots in the Student Examination Details window.

Prerequisites

Examination period is defined

Navigation

Academic Records > Assessment > Examination Timetable > Student Examination Details

Steps

1. Query the relevant examination period to view details of associated examination sessions. For each examination session venue, the students expected to attend are displayed in the Student Examination Instance region.
You can override the student seat number.
2. Click **Default Attended** to view the default number of students who attended the examination.
3. Click **Order By** to select the order in which to sort the results in the Order By window.
4. Save your work.

6.4.5.6 Producing Exam Supervisor Labels

The Exam Supervisor Labels concurrent process produces labels for mailing external examination papers and examination session information to examination supervisors, particularly those in charge of external locations.

Prerequisites

Examination supervisors with a correspondence address are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Exam Supervisor Labels concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Exam Supervisor Labels concurrent process.

Table 6–23 Exam Supervisor Labels Concurrent Process

Parameter	Procedure
Runtime Comment	Enter the comment that appears on header page of report.
Examination Period	Select the examination period. This is a mandatory parameter.
Exam Session	Enter the exam session.
Exam Location Type	Select the exam location type.
Exam Location	Select the exam location.
Supervisor Type	Select the supervisor type. This is the institution-defined classification of supervisor for assessment or research.
Unit Code	Select the unit code.
Assessment Item ID	Select the assessment ID. This is a system-generated number identifying the assessment item.
Report Sort Option	Select the report sort option.

6.4.5.7 Producing Examination Packaging Labels

The Examination Packaging Labels Report concurrent process produces large labels for packages of examination materials sent to examination location supervisors.

These labels are used as a checklist when sending and receiving materials, to ensure that correct materials are included in each package. They display special instructions or announcements for the examination.

This concurrent process is run by an Assessments specialist before and during examination periods.

Prerequisites

Examination material exists.

Examination supervisors are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Examination Packaging Labels Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Examination Packaging Labels Report concurrent process.

Table 6–24 Examination Packaging Labels Report Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report.
Examination Period	Select the examinations period. This is a mandatory parameter.
Examination Date	Select the examination date.
Examination Session	Enter the examination session.
Examination Location Type	Select the examination location type.
Examination Location	Select the examination location.
Unit Code	Select the unit code.
Assessment Item	Select the assessment item.

6.4.5.8 Producing Result Sheets

The Result Sheet concurrent process produces mark sheets used to record unit attempt outcomes. Each mark sheet has a unique sheet number to easily select unit offerings in the Mark/Grade Entry window and enter results manually.

This concurrent process is run by an Assessments specialist once per assessment period before the results processing cycle. You can run this concurrent process only after result sheets are created.

The report displays Y in the Special Consideration Application column if special consideration applications exist. If an outcome exists for an application, the outcome code appears in the Special Consideration Outcome column.

The Duplicate dynamic prompt appears on top of each page if a result sheet was previously generated for the unit offering, and if students appearing on each list are identical. Each result sheet is for a specific unit location and unit mode.

Prerequisites

Unit attempt outcomes exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Result Sheet concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Result Sheet concurrent process.

Table 6–25 Result Sheet Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on header page of report.
Assessment Period	Select the assessment period. This is a mandatory parameter.
Teaching Period	Select the teaching period. This is a mandatory parameter.
Text Field A	Select the information to be displayed on the result sheet’s first page. This is used as instructions for completing and submitting result sheets.
Text Field B	Select the information to be displayed on the result sheet’s first page. This is used as instructions for completing and submitting result sheets.
Include Discontinued Units	Select the appropriate option to include or exclude discontinued units in the result sheets.

Table 6–25 Result Sheet Parameters

Parameter	Description
Sort Order	Select the sort order.
Unit Responsible Organizational Unit	Select the responsible organizational unit.
Unit Code	Select the unit code.
Unit Location	Select the unit location.
Unit Mode	Select the unit attendance mode.
Grading Period	Select the grading period for which result sheet is to be generated. This is a mandatory parameter.
Show Grading Schema	Select Yes or No to specify whether or not to include grading schema in the result sheet.
Unit Class	Select the unit class.
Call Number	Select the call number.

6.4.5.9 Tracking Result Sheets

The Result Entry Control Sheet concurrent process tracks the movement of mark sheets.

This concurrent process is run by an Assessments specialist only after result sheets are produced.

The report produces an output file in the user's root directory that can be opened by a spreadsheet, word processing, or database application.

Prerequisites

Mark sheets exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Result Entry Control Sheet concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Result Entry Control Sheet concurrent process.

Table 6–26 Result Entry Control Sheet Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report.
Assessment Period	Select the assessment period. This is a mandatory parameter.
Owning Organizational Unit	Select the owning organizational unit. Note: Only active organizational units are displayed. If closed organizational units are required, the percent sign,%, must be used instead of selecting an item from the list of values.
Unit Code	Select the unit code.
Teaching Period	Select the teaching period.
Unit Location	Select the unit location.
Unit Mode	Select the unit attendance mode.
Sort By	Sort by

6.4.5.10 Generating Examination Schedule Report

The Unit Clash Report concurrent process produces a list of all units with examinations scheduled in a specified examination period. It also lists units with examination schedule conflicts.

This concurrent process is run by an assessments specialist before examination timetabling as required.

Prerequisites

Examination period is defined.

Examinations are scheduled.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Unit Clash Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Unit Clash Report concurrent process.

Table 6–27 Unit Clash Report Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report.
Examination Period	Select the examination period. This is a mandatory parameter.
Teaching Period	Select the teaching period.
Unit Code	Select the unit code.
Unit Location	Select the unit location.
Minimum Number of Co Enrolled Students	Minimum number of co-enrolled students that must exist before report is produced.
Report Sort Options	Select the report sort option.

6.5 Managing Academic Statistics

6.5.1 Overview

Academic statistics calculates and measures student progress and academic success using different statistic types such as *Attempted Credit Points*, *Earned Credit Points*, *GPA*, *GPA Quality Points*, and *GPA Credit Points*. The statistics gathered can be cumulative or for a specific period.

Statistics can be displayed on student transcripts.

Specialized GPAs such as Major or Minor GPA and evaluations for degree completion can be calculated by an external system and stored in Oracle Student System.

Managing academic statistics involves the following tasks:

- [Overriding Career/Program Relationship](#)
- [Class Rank](#)
- [External Results](#)

6.5.2 Overriding Career/Program Relationship

Each unit is assigned a program level such as graduate or undergraduate. For example, BA-Psychology is assigned an undergraduate level in the BA program. If the student is in a graduate program, this unit is not part of the student career statistics and does not appear in the transcript. You can override this definition in the Student Program/Unit Relationship Exceptions window.

Prerequisites

Career - program relationships are defined.

Academic statistics are configured.

Navigation

Academic Records > Academic Statistics > Student Program/Unit Relationship Exceptions

Additional Notes

You can choose whether or not to include unit attempts as part of student statistics and display them on transcripts. You can override this option by selecting or deselecting the relevant check boxes.

6.5.3 Class Rank

Class rank provides comparative information on a student academic performance in relation to a group of students. The process of ranking includes the following:

- [Creating Class Rank Cohorts](#)
- [Assigning Ranks to Students](#)
- [Viewing/Overriding Class Rank](#)

6.5.3.1 Creating Class Rank Cohorts

Class rank cohorts are created to specify a group of students for comparison and define the grade point average to be used as a measure for ranking. Students can

have many rankings during a program of study such as Freshman, Sophomore, and Graduating.

A rule is associated with each cohort to filter the students. For example, an academic institution wants to rank how the freshman class has performed during the year based on student cumulative GPA. The ranking cohort is defined by selecting a cumulative GPA statistics type, and associating a rule such as, *All Students whose class standing is FRESHMAN*.

Class rank can be displayed on student transcripts or viewed in the Academic History self-service page. The actual display of class rank varies from institution to institution and even within organizational units of an academic institution. One common rank display is *n of N*, where n is the individual's position within the total population of N in the cohort. Other display forms are *percentiles*, *deciles*, *quartiles*, and *top third*.

Prerequisites

IGS - Class rank cohort management profile is set to Yes.

Navigation

Academic Records > Academic Statistics > Class Rank Cohorts

Steps

1. Enter the cohort name and description. You can group the cohort by organizational unit by specifying the organizational unit.
You cannot make any changes to the records if the Closed check box is selected.
2. From the GPA Statistics the list of values, select the higher education statistic type that the cohort is ranked against.
3. Choose either Term or Cumulative period as the time frame for statistic calculation.
4. The Default Display Type indicates how the value of the rank is displayed in self- service.
5. Select Do Not Skip Values in the Event of Ties to use Dense rank as the method of display. Dense rank is a function that displays rank in the ascending order as 1,2,3,4,5,6. Rank is the defaulting ordering.
6. You can choose to display the class rank information on student transcripts and view as academic history in self-service.

7. Click **Edit Rule** to define a rule for the cohort.
8. The cohort instance defines the time period for which the statistics are calculated and ranked. You can associate only one calendar period instance with a cohort name.

The total number of students within the cohort instance is displayed.

The default values for Cohort Total and Run Date are Null. The default value for Cohort Status is **Working**. The default value for Rank Status is **Working**.

You cannot change the rank status to **Final** if the cohort status is not **Frozen**.

9. Save your work.
10. Click relevant buttons to assign ranks and view/override ranks.

For details, see [Assigning Ranks to Students](#) and [Viewing/Overriding Class Rank](#).

Guidelines

A class rank cohort can use the following rules as criteria for student selection:

- **Academic standing/Progression status:** All student program attempts with the specified progression outcomes are considered
- **Attendance type:** All student program attempts with the specified attendance types are considered
- **Class standing:** All student program attempts with the specified class standing are considered
- **Graduates:** All student program attempts for students who graduated within the a graduation round that is within the current cohort instance period are considered
- **Graduation year:** All student program attempts with a derived completion date within the specified year are considered
- **Minimum credit:** All student program attempts for the additional option where the student has earned credits greater than or equal to the specified minimum. This rule is used in conjunction with at least one additional option, with a number greater than zero are considered
- **Organizational unit:** All student program attempts with an enrolled status for the organizational unit are considered

- **Person ID group:** All student program attempts for students who are members of the person ID group are considered
- **Program code:** All student program attempts with an enrolled status for the specified program are considered
- **Unit set code:** All student program attempts for students with the specified unit set attempt are considered

Class Rank Display Types

The following are the different rank display types:

- **n of N:** A ranking display in which the individual's position is n within the total population of N.
- **Percentile:** A division of 100 equal parts usually expressed as 99th percentile, 98th percentile, 97th percentile.
- **Vigintile:** A division of 20 equal parts usually expressed as 95th percentile, 90th percentile, 85th percentile, and so on.
- **Decile:** A division of 10 equal parts usually expressed as 90th percentile, 80th percentile, 70th percentile.
- **Quintile:** A division of 5 equal parts usually expressed as 80th percentile, 60th percentile, 40th percentile, and so on.
- **Quartile:** A division of 4 equal parts usually expressed as 75th percentile, 50th percentile, 25th percentile, and so on.
- **Top Third:** A division of 3 equal parts usually expressed as Top Third for only those in that category.

6.5.3.2 Assigning Ranks to Students

Once a class rank cohort is defined, the students in the cohort are assigned ranks using the defined grade point average measure.

The Run Ranking concurrent process performs the following tasks:

- Selects students for a defined cohort
- Updates a previous cohort if its status is not Frozen
- Assigns ranks to the selected students based on GPA if the run status is not **Final**

Validations

You must enter either the cohort name or the calendar period.

If you specify the Cohort Name, the calendar period is the instance for only that cohort name. If the instance does not exist for the cohort name/calendar combination, it is created.

If you specify the Organizational Unit, the process is run for all cohort name/calendar period instances where the organization unit matches. If no instances exist for the cohort name/calendar period combination, they are created.

If the Cohort Status is **Working**, the cohort rules are used to select students. If the Cohort Status is **Frozen**, the selection from Class Rank Cohort Rankings is used.

If the Rank Status is **Working**, the GPAs are retrieved and rank is calculated. If the Rank Status is **Final**, no ranking is performed.

If the Do Not Skip Rank Values in the Event of Ties indicator is set in the Class Rank Cohorts window, the Dense Rank function is used, otherwise the Rank function is the default.

You can also run the Run Ranking concurrent process from the Class Rank Cohorts window using the **Run Ranking** button.

You cannot initiate the Run Ranking concurrent process when both cohort status and rank status are **Frozen** and **Final**.

Prerequisites

Class rank cohorts are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Run Ranking concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for Run Ranking concurrent process.

Table 6–28 Run Ranking Parameters

Parameter	Description
Cohort Name	Enter the cohort name. The students in the specified cohort are assigned ranks.
Calendar Period	Select the calendar period.
Organization Code	Enter the organization code.

6.5.3.3 Viewing/Overriding Class Rank

You can view or override student rank in the View/Override Class Ranks window.

Prerequisites

Students are assigned class rank.

Profile IGS: Class Rank Override is set to Yes.

Navigation

Academic Records > Academic Statistics > Class Rank Cohorts > View/Override Class Rank

Additional Notes

You can manually override the class rank for a student without disturbing the rest of the ranking in the cohort. An overridden rank contains the same value as another that of another student. If override values exist for the student, the Override Rank and Comment fields display the values.

You cannot have an override value greater than the cohort total.

6.5.4 External Results

The results of external student evaluations such as specialized GPA calculations or degree completion are used to update student records in Oracle Student System.

The process of calculating external results has the following tasks:

- [Uploading External Statistics](#)
- [Uploading External Completion](#)

6.5.4.1 Uploading External Statistics

Oracle Student System does not provide for the calculation of special statistics such as Major or Minor GPA. Such academic statistics are calculated outside of Oracle Student System using an external system, imported into interface tables, and uploaded to Oracle Student System.

Run the Upload External Statistics concurrent process to validate the interface data for external statistics and upload it into Oracle Student System. If the records pass all validations and are stored, they are deleted from the interface table.

You can run this concurrent process using the Degree Audit Interface self-service pages, or separately.

Prerequisites

Calculated statistical data exists in the interface tables.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Upload External Statistics concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

This concurrent process has a single parameter, Batch ID. Enter the batch ID for which the process is to be run. This is a mandatory parameter.

Scenario

Vision University requires a Major GPA to be reported for students. The university defines a statistic type of **Major** with a derivation method of **Stored**. After the grades are posted for a term, the university uses an external system to determine the Major GPA for the students. These results are stored within Oracle Student System. During subsequent transcript production, the Major GPA is displayed using the stored statistics.

For information on Statistic types, see *Oracle Student System Implementation and Administration Guide*.

6.5.4.2 Uploading External Completion

Before a program can be completed, all student unit set attempts are either completed or ended. The Upload External Completion concurrent process reads unit set completion details from a Unit Set Completion interface table and completes the student unit set attempts. Next, the student program attempts are read from a Program Attempt interface table. Within the context of the program attempt, the student unit set attempts are again checked for any incomplete or non-ended attempts. These unit set attempts are then either completed or ended, depending on the method selected as a concurrent process parameter. The student program attempts are then completed.

The Upload External Completion concurrent process allows you to pick a default action for open unit set attempts either by setting the end date or completion date to the date provided in the interface table.

You can run this concurrent process through the Degree Audit Interface self-service pages, or separately.

Prerequisites

Unit set and program attempt completion details exist in the interface table.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Upload External Completion concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Upload External Completion concurrent process.

Table 6–29 Upload External Completion Parameters

Parameter	Description
Batch ID	Enter the Batch ID for which the concurrent process is to be run.

Table 6–29 Upload External Completion Parameters

Parameter	Description
Close Unit Set Method	<p>Units sets that are not completed by the Unit Set completion process are handled by this parameter.</p> <p>If you choose Completed, the unit set attempts are marked as Completed using the system date as the completion date. If you choose Ended, the unit set attempts are marked as Ended using the Program Completion Date as the end date.</p>

The concurrent process produces an output log showing the status of each record from the interface table. If the record is successfully stored, the status is **Stored**, if not, the status is **Error**.

If the record is successfully stored, the row is deleted from the interface table.

Scenario

Vision University is completing the spring term and wants to finalize the degree completion for the graduating class. After sending the possible graduates through an external system to verify program requirements, the results are returned to Oracle Student System and the student unit set attempts and program attempts are marked as completed.

6.6 Applying Progression Rules and Outcomes

6.6.1 Overview

The administrator defines progression rules to monitor and evaluate student performance, and assign corresponding outcomes to program attempts for a progression period. Prior progression period outcomes and advanced standing units are also considered in the evaluation of student academic progress.

A progression rule can be defined as follows:

- **General rule:** Predefined general progression rules, used for the institution or for more than one organizational unit
- **Application-specific rule:** Rules defined for a specific program type, version, or organizational unit

For more information on defining progression rules, see Progression in *Oracle Student System Implementation and Administration Guide*.

Progression must be configured to establish the default progression periods for the institution. You can override system-level progression periods with progression periods at the organizational-unit or program-version level.

Progression Process

The process of progression evaluation occurs in two phases:

- Applying progression rules: Progression rules are applied either manually for a single student or automatically to a group of students.
- Applying outcomes: Outcomes are applied either manually for a single student or automatically to a group of students. When it is necessary to apply outcomes on students regardless of progression rules, you can manually apply outcomes to student program attempts.

When a student enrolls for a program, the records administrator applies the associated progression rules to the student program attempt. When a progression rule is applied, the associated outcomes are also applied. If a progression rule has more than one outcome attached, ranks are assigned to outcomes in order of priority. When a student fails more than one rule, each with a different outcome, the records administrator chooses which outcomes to apply.

All outcomes are approved before they are applied. Based on the outcome definition, students can show cause or appeal before and after an outcome is applied. When this happens, an institutional committee examines student explanation to either accept or dismiss the appeal, and update the outcome accordingly. Students are notified when an outcome is approved, applied, removed, cancelled, or waived, or when a show cause or appeal decision is upheld or dismissed.

In self-service, faculty can use a spreadsheet to assign outcomes to student records. These records are then uploaded into an interface table and imported into Oracle Student System.

The following table describes the outcome decision statuses that are allowed in Oracle Student System.

Table 6–30 Outcome Decision Status Changes

Decision Status	Changes to	Explanation
Pending	Approved	When outcome results from most recent check of rule in this progression period Pending outcomes resulting in an earlier rule check in the same progression period must be waived.
Approved	Waived	If outcome has not yet been applied
Approved	Pending	Existing decision details are deleted if outcome is not yet applied
Approved	Cancelled	After an outcome was applied and before outcome’s expiry date
Waived	Pending or Approved	Outcome must be one that was added as a consequence of the most recent rule check in this progression period. Waived outcomes from earlier checks of this rule in this period cannot be reset. Decision details must be deleted when updating status to Pending and inserted when updating status to Approved.
Cancelled	Approved	N/A

Progression involves the following functionality:

- [Applying Progression Rules](#)
- [Applying Outcomes](#)

6.6.2 Applying Progression Rules

You can apply an existing progression rule to a student program attempt or define a specific rule for the program attempt. Rules are applied only to enrolled and confirmed program attempts.

You can apply progression rules manually for a student program attempt or run the appropriate concurrent process.

Applying progression rules involves the following tasks:

- [Defining Progression Rules](#)
- [Associating Progression Rules](#)

- [Manually Applying Progression Rules](#)
- [Automatically Applying Progression Rules](#)

6.6.2.1 Defining Progression Rules

You can define progression rules at three levels: organizational unit, program type, and program version.

For information on defining progression rules, see Progression in *Oracle Student System Implementation and Administration Guide*.

6.6.2.2 Associating Progression Rules

For information on associating progression rules to a program version, organizational unit, and program type, see Progression in *Oracle Student System Implementation and Administration Guide*.

6.6.2.3 Manually Applying Progression Rules

The records administrator manually applies progression rules to a program attempt in the Student Progression Rule Check window. You can also associate outcomes to program attempts, view details of student unit attempts, and the rules applied.

Additionally, you can view messages for failed rules and a summary of rules for a particular rule category in the appropriate tabs.

Prerequisites

Progression calendar is defined.

Progression rule categories are defined.

Progression rule outcomes are defined.

Student has unit attempts in a teaching period related to the progression period.

The application start date alias for the progression period is not greater than the current date.

At least one rule is defined at the organizational unit, program type, or program version level.

Navigation

Academic Records > Progression > Student Progression Rule Check

Steps

1. Query the person number in the Student Progression Rule Check window.

The progression period, grade point average, and weighted average mark for the program are displayed in the Student Progression Period region.

Progression periods are displayed for the queried program attempt and the academic period for which the program attempt is pre-enrolled. You can apply progression rules for different progression periods for a program attempt.
2. Choose a progression period and select **Manual Rule Check** to apply progression rules to a student program attempt.

The System Check Type is displayed as Manual for a manual rule check. Click **Show All** to view the number of instances a rule is applied.

A progression rule defined at the program-version level overrides the one defined at the organizational-unit level if the rules belong to the same rule category.
3. Click **Rule Application Detail** in the Student Progression Period region to view all rules applied to a student program attempt.
4. Click **Student Unit Attempt** to view details of student unit attempts.
5. Choose a progression rule category in the Student Progression Rule Check region and click **Rule Summary** to view information regarding the progression rule applied for the rule category.
6. View rule message for failed rules in the Rule Message tab.
7. Save your work.

6.6.2.4 Automatically Applying Progression Rules

Run the Progression Rule Application Report concurrent process to automatically apply progression rules for multiple student program attempts. This concurrent process evaluates student program attempts against applicable progression rules and updates progression status.

Prerequisites

Progression rules and progression calendar are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Progression Rule Application Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Progression Rule Application Report concurrent process.

Table 6–31 Progression Rule Application Report Parameters

Parameter	Description
Comment	Enter a comment to appear on the report.
Select Either Previous Log Date or a Combination of the following	Select a previous log date to reproduces that report. You cannot enter other parameters except Exclude Passed. If this parameter is not specified, you can specify any combination of the following parameters to restrict the application of progression rules.
Program Type	Select the program type. This is an institution-defined classification of higher education programs.
Enrollment Category	Select the enrollment category.
Exclude Passed	Select Yes or No .
Location	Select the location where an institution conducts business or holds classes.
Organizational Unit	Select the organizational unit.
Person ID Group	Select the person ID group comprising persons with common characteristics defined by the institution.
Attendance Mode	Select the program mode of attendance such as on campus or off campus.

Table 6–31 Progression Rule Application Report Parameters

Parameter	Description
Processing Type	<p>Select the processing type of INITIAL, TODO, or BOTH.</p> <p>INITIAL restricts the processing to students to whom rules are being applied for the first time.</p> <p>TODO restricts processing to students who have been previously checked and a Student ToDo entry exists.</p> <p>BOTH takes all students into account.</p> <p>Note: You cannot select TODO and BOTH if a progression calendar is specified.</p>
Progress Status	Select the progression status.
Progression Calendar	Select the progression calendar for which the process is to be run.

Once the concurrent process is run, the System Check Type field in the Student Progression Rule Check window is displayed as System. When there is a grade change, a system check type of To Do is assigned to indicate that the unit attempt must be included when the process is next run.

6.6.3 Applying Outcomes

When progression rules are applied and the student fails the rule, corresponding outcomes are applied to the program attempt. Outcomes are assigned at three levels:

- Progression rule category
- Progression rule
- Progression rule application

Applying outcomes includes the following tasks:

- [Manually Applying Outcomes](#)
- [Automatically Applying Outcomes](#)
- [Importing Progression Outcomes](#)
- [Identifying Progression Outcome Import Failure](#)
- [Maintaining Progression Details](#)

6.6.3.1 Manually Applying Outcomes

Apply outcomes manually against a student program attempt using the Student Progression Rule Check window. You can also perform the following tasks:

- View details of progression rules that are checked for an individual student program attempt for each progression period
- Create a manual outcome against a student program outcome; outcome need not be the result of a progression rule check that has failed
- View summary details for student unit attempts that contribute to rule evaluations for context progression period
- View rule message that explains why a student failed a rule
- View summary of information relating to the context progression rule application
- Maintain student outcome details

Prerequisites

Progression outcome types are defined.

Navigation

Academic Records > Progression > Student Progression Rule Check

Steps

1. Query a person number in the Student Progression Rule Check window.
2. To apply an outcome without a progression rule, select a progression period and select **Manual Outcome**. Select the Outcome type and enter the Duration and Duration type in the Student Progression Outcome window.
3. Optionally, to apply outcome of a progression rule, select a record and click **Manual Rule Check**. A message is displayed indicating that rules were tested and the associated outcomes were applied. The details are displayed in the Student Progression Rule Check region.

Click **Student Unit Attempt** to view details of student unit attempts included in the evaluation. Click **Rule Summary** for information relating to the context progression rule application. Click **Rule Application Detail** to view all rules applicable to the student program attempt for the progression period. Click **Student Outcome** to view or modify outcome details.

You cannot enter Duration and Duration Type if the progression outcome type is **Exclusion**, **Expulsion**, or **No penalty**.

4. In the Student Progression Outcome window, change the decision status to **Approved** before applying the outcome.
5. Save your work.
6. Based on the outcome type selected, the relevant buttons get enabled in the Student Progression Outcome window. Enter relevant outcome details.
7. Save your work.

Guidelines

The Student Progression Outcome window can be accessed from either the Student Progression Rule Check window or the Progression Outcome Decision window.

The Student Progression Outcome window allows you to perform the following tasks:

- Update the decision status of an outcome
- Add an alternative outcome to a progression rule
- Apply an outcome to a student program attempt upon approval
- Enter or modifies any restrictions associated with the outcome
- Modify details of an outcome, for example, extends the duration of the outcome
- Maintain information regarding show cause or appeal available to or submitted by a student
- Create an outcome-related progression rule to apply to a particular student

6.6.3.2 Automatically Applying Outcomes

You can apply outcomes to a group of students using the Progression Rule Outcome Application Report concurrent process.

The progression outcomes resulting from the Progression Rule Application Report concurrent process are manually approved in the Progression Outcome Decision window before running the Progression Rule Outcome Application Report concurrent process.

A student progression outcome record exists when a student fails a progression rule check or a manual outcome is created. Outcomes are added to a student program attempt as either **Approved** or **Pending**. If a student progression outcome is created

with a decision status **Pending**, it can be reviewed and a decision can be made to approve or waive the outcome. These decisions are entered for groups of students in the Progression Outcome Decision window.

The Progression Rule Outcome Application Report concurrent process applies all approved progression outcomes to student program attempts.

This concurrent process also performs the following tasks:

- Lifts any associated encumbrances or discontinuations where the Decision Status of an applied progression outcome is changed to **Canceled** or **Removed**.
- When lifting restrictions, records an expiry date against applicable person encumbrances and their effects, and removes associated discontinuations.
- Inserts the current system date as the applied date when applying outcomes.
- Creates a person encumbrance record and discontinues the student program, unit set, or unit attempts where applicable.
- Generates a report of all the outcomes applied or removed.
- Provides an explanatory message to enable manual correction in case of an error.

Prerequisites

Outcomes are assigned to student program attempts.

Navigation

Academic Records > Progression > Student Progression Outcome Decision

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Enter organizational unit and progression period in the Progression Outcome Decision window. Click **Retrieve Records** to display student records. Select **Approve** or **Waive** to change decision status of an outcome and click **Process** to approve or waive.

You can also assign outcomes to a specific record using **Student Outcome**. Click **Rule Summary** to view details of rules applied to a specific record.

2. Save your work.
3. Run the Progression Rule Outcome Application Report concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

4. To set the parameters, refer to the following table.

The following table describes the parameters for the Progression Rule Outcome Application Report concurrent process.

Table 6–32 Progression Rule Outcome Application Report Parameters

Parameter	Description
Comment	Enter a comment to appear on the report.
Errors Only	Enter Yes or No . You can enter No for a full report.
Select Previous Log Date or a Combination of	Select a previous log date to reproduce that report. You cannot enter other parameters except Errors Only . If you do not enter this parameter, you can specify any combination of the following parameters to restrict the application of progression rule outcomes.
Progression Calendar	Select the progression calendar for which the process is to be run.
Progress Status	Select the progression status.
Person ID Group	Select the person ID group.
Organizational Unit	Select the institution defined organizational unit such as Dept. of Computer Science or School of Business Management.
Location	Select the location where an institution conducts business or holds classes.
Enrollment Category	Select the enrollment category.
Program Type	Select the program type.
Program Code	Select the institution-defined program code.
Attendance Mode	Select the program mode of attendance such as on campus or off campus.

6.6.3.3 Importing Progression Outcomes

Progression outcomes entered in a spreadsheet must be converted into an interface table, and then imported into Oracle Student System through this process. Run the Progression Outcome Upload and Validation Process to import progression outcomes from an interface table.

Progression outcome records which fail the validation and cannot be uploaded by this process are reported by the Progression Outcome Exception Report concurrent process.

Prerequisites

Progression rules and progression calendar are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Progression Outcome Upload and Validation Process concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Progression Outcome Upload and Validation Process concurrent process.

Table 6–33 Progression Outcome Upload and Validation Process Parameters

Parameter	Description
User ID	Enter the login ID of the user running the process. This is a mandatory parameter.
Batch Date	Enter the date of creating the interface tables.
Grade Creation Method	Select the method of grade creation. This is a mandatory parameter.
Delete Rows	Select Yes or No . If you select Yes , the rows in the interface table which are successfully uploaded into the Oracle Student System are deleted. This is a mandatory parameter.

6.6.3.4 Identifying Progression Outcome Import Failure

The Progression Outcome Upload and Validation concurrent process imports progression outcomes from an interface table. Run the Progression Outcome

Exception Report concurrent process for a report on the records that fail validation and are not uploaded into Oracle Student System.

Prerequisites

The Progression Outcome Upload and Validation concurrent process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Progression Outcome Exception Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Progression Outcome Exception Report concurrent process.

Table 6–34 Progression Outcome Exception Report Parameters

Parameter	Description
User ID	Enter the login ID of the user running the process.
Batch Date	Select the date of creating the interface tables.
Delete Rows	Select Yes or No . If you select Yes , the rows in the interface table that are successfully uploaded into the Oracle Student System are deleted. This is a mandatory parameter.

6.6.3.5 Maintaining Progression Details

Run the Progression Maintenance Process concurrent process to record changes in student progression outcome expiry dates and student progression statuses.

This concurrent process derives and records expiry dates for applied student progression outcomes of type **Probation**, **Suspension**, or **Manual**. It updates the student progression status based on the progression outcome applied.

Program attempts with the following statuses are checked and updated:

- Progression status of **Goodstand** with an approved student progression outcome
- Progression status of **Undconsid** without pending student progression outcomes
- Progression status of **Showcause** after the show cause period is complete
- Progression status of **Probation, Suspension, Exclusion, or Expulsion** with an expired or removed outcome

Prerequisites

Outcomes are assigned to student program attempts.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Progression Maintenance Process concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

This concurrent process does not have any parameters.

6.7 Applying Program Completion Rules

6.7.1 Overview

Completion rules allow the educational institution to clearly define completion requirements for the components of a program (unit set and program stage) and the program version. The progression specialist applies completion rules to a student program attempt to determine whether or not a student has completed the requirements.

Completion rules can be defined at the program version, program stage, and unit set levels. Each has a single completion rule. For more information on rules, see Program Structure and Planning in *Oracle Student System Implementation and Administration Guide*.

A program stage rule is evaluated in isolation, and does not take into consideration other stages. For example, a simple 3-stage program requires a student to achieve 8

credit points for Stage 1, 8 credit points for Stage 2 and 10 credit points for Stage 3. The rule for Stage 2 requires a student to earn 16 credit points (that is Stage 1 plus an additional 8 credit points).

A student program attempt is evaluated based on:

- The number of credit points earned
- The program completed
- The program stages completed
- The units completed
- The unit sets completed
- The grade point average or weighted average mark earned
- Grades earned in excess of minimum acceptable grade values

A program stage is evaluated based on:

- The number of credit points earned
- Other program stages completed
- The units sets completed
- The units completed
- The GPA and WAM
- The special requirements completed

A unit set is evaluated based on:

- The number of credit points earned
- The program stages completed
- Other units sets completed
- The units completed
- The special requirements completed

6.7.2 Evaluating Program Completion

Evaluating program completion involves the following tasks:

- [Verifying Program Completion Rules](#)
- [Manually Completing Program Attempts](#)

- [Automatically Completing Program Attempts and Awards](#)

6.7.2.1 Verifying Program Completion Rules

You can define rules for completing a program attempt or unit set attempt. Completion rules are based on the number of credit points achieved, grade point average, and weighted average mark attained. Once the rules are satisfied, the administrator updates the status of the student program attempt or unit set attempt.

Prerequisites

Completion rules are defined at either program version, program stage, or unit set level.

If an alternative exit is provided for a program, completion rules are defined for it.

Navigation

Academic Records > Progression > Program Completion Query

Steps

1. Query the person number to check for completion rules in the Progression Completion Query window.

The rules attached to the program version, if any, are displayed in the Program Completion Rule region.

The **Program Stage** and **Alternative Exit** buttons are enabled if defined for the displayed program version. The **Unit Set** button is enabled if the student has any unit set attempts or if the Predictive check box is selected.

2. Click **Rule** to check the completion rule for the program version. A message is displayed indicating whether the rule is completed or not.
3. Select Predictive to check completion rules for a program attempt with an Enrolled status. Running in predictive mode allows you to identify eligible graduates.

A standard evaluation is based on the current status of the relevant student program attempt. *A predictive evaluation* is based on the assumption that the student will complete all the enrolled unit attempts.

4. Click **Program Stage**, **Unit Set**, and **Alternative Exit**, if enabled, and click **Rule** to check the completion rules for program stage, unit set, or alternative exit in the relevant windows. A message is displayed indicating whether the rule is completed or not.

If you override the completion rule and complete the program manually, Manually Completed is automatically selected for the program stage.

The Program Stage window displays all program stages defined for the program version. You cannot modify the details displayed in this window. You can restrict the stages displayed to a specific program stage by specifying the Program Stage Type or Description fields.

The top region of the Unit Set window is dynamic. The data displayed is based on the setting of the Predictive check box. If the Predictive check box is not selected, the top region is labeled Student Unit Set Attempts and unit set completion rule evaluation is run in standard mode. If the Predictive check box is selected, the region is labeled Unit Set and the rule evaluation is run in predictive mode and all possible unit sets are displayed.

The Alternative Exit window displays all alternative exits for program versions. You cannot modify the data displayed.

6.7.2.2 Manually Completing Program Attempts

The evaluation of completion rules does not automatically indicate that the student program attempt is complete. The Requirements Complete indicator must be manually set in the Complete Student Program Attempts window to complete a program attempt.

Prerequisites

Completion rules are defined at program version, program stage, or unit set level.

If an alternative exit is provided for a program, completion rules are defined for it.

Navigation

Academic Records > Progression > Student Program Attempts

Steps

1. Query the person number in the Complete Student Program Attempts window. Select Requirements Complete to indicate that program completion requirements are satisfied.

You cannot set the Requirements Complete indicator for student program attempts with a status of **Discontinued**, **Intermit**, **Lapsed**, or **Unconfirm**.

You cannot change the setting of the Requirements Complete check box if the status of the student program attempt is **Completed**, and the graduand record has the status **Graduated**.

2. Save your work.
3. Click **Unit Set Attempt** and select Completed in the Unit Set Attempt window.
4. If the program has an alternative exit, click **Alternative Exit** and select Requirements Complete. Save your work.

An alternative exit record is created when a student has not completed the requirements for the current program attempt, but has completed components of the program that qualify the student for an alternative award. For example, a student partially completes an undergraduate degree, and decides to take out an alternative diploma award, rather than finish all the program requirements and take out a degree.

5. If a unit set is available for the alternative exit, click **Unit Set Attempt** to complete the requirements.
6. Click **Academic History** to view the academic details in the Student Program Attempt window.

Guidelines

In the Graduation subsystem, the Assign Graduand Status concurrent process checks the value of the Requirements Complete check box to identify eligible graduates.

If a potential graduate's Requirements Complete check box is set to Y since the previous run of the process, the graduand status is updated to **Eligible**. If an eligible graduate's Requirements Complete check box has been deselected since the previous run of the process, that graduand's status is updated to **Potential**.

This check is also performed when the manual update of graduand status is attempted in the Graduand Details window.

6.7.2.3 Automatically Completing Program Attempts and Awards

Students can complete a program attempt and be eligible to graduate, but not receive an award. In such cases, the administrator can choose to complete a program independent of an award and vice versa.

You can complete a group of program attempts or awards in the Completion Decision window.

Prerequisites

Student program attempts exist.

Navigation

Academic Records > Progression > Completion Decision

Steps

1. Administrators can query the Student Award Aim records using the following filters:

- Organizational Unit
- Program Code
- Unit Set
- Award Code
- Program Type
- Program Status (Complete, Incomplete, All)
- Award Status (Complete, Incomplete, Conferred, All)

Enter relevant fields to restrict your search. Click **Retrieve Records** to view program attempts.

2. Click **Derive** to derive award mark and grade for a specific program attempt.

You can enter the award grade without entering an award mark. You can also manually override the derived award grade.

Award marks entered must range between **0** to **100**.

3. To complete a program or award, select relevant check boxes and click **Process**. The status for award or program gets updated to **Complete**. If an error occurs during processing, the relevant record is highlighted.

Select **Error Message** to view details of the error.

The **Process** button is disabled if there are no records with the Complete Program/Complete Award check box selected.

4. Click **Award Aim** to make changes to the student program attempt award in the Student Program Attempt Award window.
5. Click **Student Program Attempt** to manually complete student program attempts and unit set attempts.

6. Click **Derive Award Mark** to derive award marks for all the retrieved records.
7. Click **Special Awards** to assign special awards to the program attempt in the Special Awards window. You can choose to announce the special award at the ceremony.

For details, see [Entering Details of Special Awards](#).

Validations

When the **Process** button is selected, the following occurs:

- If Complete Program check box is selected, student program attempt and corresponding unit sets will be completed
- If Complete Award check box is selected, student program attempt award is completed and no processing is done for student program attempt and unit sets. Completing the student program attempt award means completing the student program attempt award record and populating the end date with the system date.

6.8 Managing Graduation

6.8.1 Overview

Graduation marks the successful completion of an academic program. Using Oracle Student System, you can identify eligible graduates, conduct a graduation ceremony, and confer honors.

A graduation ceremony is associated with a ceremony round - a period of time during which a set of graduation ceremonies is conducted, for example Spring semester 2003. You can have more than one ceremony round during an academic year, for example, at the end of both spring and winter teaching periods. You can also create multiple ceremony locations within the same ceremony round. Ceremonies are conducted at different locations if the graduation process is decentralized or if students from different campuses graduate at the same time.

Based on the response from graduands about their intention either to attend the current ceremony round or receive graduation in absentia, the graduation specialist records the list of graduands and their order of presentation.

All awards to be presented at each ceremony, except for honorary awards, are associated with a program. These program awards can be subdivided into unit set

groups so that graduands are present in alphabetical order within the unit set group rather than in alphabetical order within the award.

At both the award and unit set group level, order numbers control the presentation sequence. At either level, two or more records can be grouped by assigning them the same order number, although for program awards, they must have the same award code. Within the final groups, graduands are sorted into alphabetical order and assigned a unique number.

You can group graduands as follows:

- Within a program award, such as Engineering 614/1
- By major within a program award, such as Electronics 300/2
- By major across two programs with a common award, such as Commerce 300/1 and Commerce 300D/1
- By program award across program versions, such as Engineering 355/1 and Engineering 355/2
- By honorary award

Any or all of these variations can be used to set up an order sequence for a single ceremony.

The following table describes different sample graduand grouping combinations. The first three columns refer to program awards. The last three columns refer to unit set components.

Table 6–35 Sample Graduand Grouping Combinations

Program Version	Award	Order in Ceremony	Unit Set Group	Unit Sets	Order in Award
Engineering 614/1	1520	1	N/A	N/A	N/A
Engineering 300/2	1188	5	Electronics Major Robotics Major	ECMJ RBMJ	1
NA	NA	NA	Manufacturing Major	MFMJ	5
Commerce 300/1	1002	10	Accounting Major Banking and Finance Major	ACMJ001 BFMJ0001	1

Table 6–35 (Cont.) Sample Graduand Grouping Combinations

Program Version	Award	Order in Ceremony	Unit Set Group	Unit Sets	Order in Award
Commerce 300D/1	1002	10	Economics Major	ECMJ001	5
			Accounting Major Banking and Finance Major	ACMJ001 BFMJ0001	1
Engineering 355/1	1015	25	N/A	N/A	N/A
Engineering 355/2	1015	25	N/A	N/A	N/A
	PHD-HON	30	N/A	N/A	N/A

A graduand's progress through a graduation cycle is determined by the following:

- **Graduand status:** A graduand's academic standing
- **Approval status:** Indicates whether the graduation council or relevant organizational unit has granted formal approval to graduate
- **Graduand type:** Denotes the graduand's intentions with regard to receiving an award or attending a ceremony

The process of graduation involves the following tasks:

- [Entering Ceremony Round Details](#)
- [Creating Graduand Ceremony Details](#)
- [Entering Graduand Details](#)
- [Viewing Graduand History](#)
- [Assigning Graduands to an Award Ceremony](#)
- [Viewing Graduand Award Ceremony History](#)
- [Assigning Graduands to a Unit Set Group](#)
- [Entering Details of Special Awards](#)
- [Identifying and Creating Graduands](#)

- [Automatically Assigning Graduands to Ceremony](#)
- [Obtaining Council Approval](#)
- [Assigning Graduand Status](#)
- [Assigning Graduand Order in Presentation](#)
- [Setting Graduand Seating Order](#)
- [Producing a Register](#)
- [Maintaining Graduand Records](#)

6.8.1.1 Entering Ceremony Round Details

You can define and modify ceremony rounds and the associated graduation ceremonies in the Graduation Ceremony window.

Prerequisites

Awards and ceremony venue codes are defined.

Graduation calendar with date aliases is defined.

Navigation

Academic Records > Graduation > Graduation Ceremony

Steps

1. Enter the calendar, start and end date aliases for the ceremony round.
2. You can enter only one of the following fields:
 - Conferral start and end dates: Student program attempt award records with conferral dates within this range, are identified to create graduand records.
 - Program completion start and end dates: Student program attempt records with program requirements complete dates within this range, are identified to create graduand records.
 - Ceremony round year and completion period: Student program attempt records with ceremony round and completion period within this range, are identified to create graduand records.

3. Enter the relevant graduation ceremony details.

You cannot change the ceremony date alias once graduands are assigned to the ceremony.

You cannot automatically assign graduands to ceremonies after the specified closing date alias.

4. Select the relevant buttons to perform the following:
 - **Notes** to enter additional information about a ceremony in the Graduation Ceremony Notes window
 - **Graduands** for a list of graduands in a ceremony or a ceremony round
 - **Award Ceremony** to enter awards to be presented at a ceremony

For details on award ceremony, see [Assigning Graduands to an Award Ceremony](#).

5. Save your work.

6.8.1.2 Creating Graduand Ceremony Details

Create graduand ceremony details after the graduands are assigned to ceremonies in the Graduand Ceremony Details window.

You can also allocate honorary award recipients to a ceremony.

Prerequisites

Graduands are assigned to ceremonies.

Navigation

Academic Records > Graduation > Graduand Ceremony Details

Steps

1. Query the relevant record. The graduand ceremony details are displayed.
2. In the Graduand Award Ceremony region, enter ceremony details for graduands with a graduand type of **Attending**, **Inabsentia**, or **Unknown**.

Check that the graduand seat number is unique within the ceremony.

You can enter more than one ceremony or award detail for a graduand.
3. Enter details of guests attending each ceremony.
4. Save your work.

6.8.1.3 Entering Graduand Details

In the Graduand Details window, you can create individual graduand records for eligible or potentially eligible graduands who have not been identified by the graduand identification process. You can also modify existing graduand records.

Prerequisites

Potential or eligible graduands exist.

Navigation

Academic Records > Graduation > Graduand Details

Steps

1. Query the relevant record and the graduand details are displayed.

The graduand status is derived from the student program attempt award. The graduand is eligible only when the related program and award are complete.

Award Mark and Conferral Date are displayed from the related student program attempt award record.
2. Graduation Name defaults from the given name and surname recorded for the student, but can be changed.
3. The Proxy Award indicator records the identity of the person receiving the award on the graduand's behalf. You can either enter a known person ID or query using the Find Person icon.
4. Before receiving an award in the current round, a student must surrender any previously conferred related award. Enter the program version for which the award is surrendered.
5. Save your work.
6. Click **Ceremony** to view graduation ceremony details.

Guidelines

A graduand can have the following statuses:

- **Potential:** Student is identified as a possible graduand with program to be completed
- **Eligible:** Student has completed the program
- **Graduated:** Student has received award

- **Surrender:** Student must surrender related award in favor of a higher award

Graduands are of the following types:

- **Attending:** Student will attend the ceremony
- **Inabsentia:** Student will not attend the ceremony but will receive the award
- **Articulate:** Student declines award to pursue higher studies
- **Deferred:** Student wishes to receive award in a later ceremony round
- **Declined:** Student rejects the award for other reasons

6.8.1.4 Viewing Graduand History

You can view the history of graduands in the Graduand History window.

Prerequisites

Graduands records exist.

Navigation

Requests > Graduation History > Graduand

Additional Notes

Query the relevant record to view graduand details.

6.8.1.5 Assigning Graduands to an Award Ceremony

You assign graduands to an award ceremony in the Award Ceremony window. Enter details of the awards to be presented at the graduation ceremonies.

Prerequisites

Graduand details are entered.

Navigation

Academic Records > Graduation > Graduation Ceremony > Award Ceremony

Steps

1. Query the record and enter data in relevant fields.

The Order in Ceremony field indicates the order of awards to be presented.

The order number is unique. But you can enter a duplicate number for program awards if two different program versions have the same award code and graduands are presented in alphabetic order within the award, rather than the program version.

2. Click **Graduands** to open the Ceremony Graduands window, for a listing of graduands.
3. Click **Unit Set Groups** to order graduands by unit set group within a program and award combination or within an award that is ordered across program versions. For details, see [Assigning Graduands to a Unit Set Group](#).
4. Save your work.

6.8.1.6 Viewing Graduand Award Ceremony History

You can view the history of award ceremonies in the Graduand Award Ceremony History window.

Prerequisites

Graduands are assigned to award ceremonies.

Navigation

Requests > Graduation History > Graduand Award Ceremony

Additional Notes

Query the relevant record to view award ceremony details.

6.8.1.7 Assigning Graduands to a Unit Set Group

A program award entered in the Award Ceremony window is subdivided into groups of related unit sets. This is done to split an award across ceremonies and to present graduates in alphabetical order within their unit set grouping.

Prerequisites

Unit sets exist for the program version.

Navigation

Academic Records > Graduation > Award Ceremony > Unit Set Groups

Academic Records > Graduation > Graduation Ceremony > Award Ceremony > Unit Set Groups

Steps

1. In the Award Ceremony Unit Set Group region, enter a number to indicate the order of presentation within the program award.

The override title, if entered, is substituted wherever a group title is unsuitable or two versions of the same unit set are included in the group.

2. In the Award Ceremony Unit Set region, enter a number for each component unit set.

This affects concatenation of group titles and it does not control ordering.

3. Save your work.
4. Click **Graduands** to view the list of graduates in the selected unit set group.

6.8.1.8 Entering Details of Special Awards

A special award such as a prize or a medal, is given to a student for exceptional performance. You can assign special awards to student program attempts in the Special Awards window.

Prerequisites

Special awards are defined for the program.

Navigation

Academic Records > Graduation > Graduand Special Awards

Steps

1. Query on and select the student for whom a prize or medal is to be entered.
2. Select the relevant program attempt from those displayed in the Student Program Attempt region.
3. Select the appropriate award code. The list of values includes only open awards of type Medal or Prize.
4. You can override the default award date, which is the current date.
5. Select the Announce at Ceremony check box if the special award is to be announced at a graduation ceremony.
6. Save your work.

6.8.1.9 Identifying and Creating Graduands

The Identify and Create Graduands concurrent process performs the following tasks:

- Identifies student program attempt records where the nominated completion period matches that of the ceremony round. Also identifies records where the program requirements complete date or conferral date range is within the range specified in the ceremony round.
- Creates student program attempt award records for the default awards of the program version, where they do not exist. These records are incomplete and do not have a conferral date.

For completed student program attempt and student program attempt award records, the graduand status is **Eligible**. For incomplete student program attempt and student program attempt award records, the graduand status is **Potential**.

- Creates graduand records, if they do not exist, for student program attempt award records without an end date.

This concurrent process is run by a graduation specialist periodically during a ceremony round period. The initial run creates most graduand records. Subsequent runs create records for students whose completion periods have changed.

Prerequisites

Student program attempt records exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Identify and Create Graduands concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Identify and Create Graduands concurrent process.

Table 6–36 Identify and Create Graduands Parameters

Parameter	Description
Ceremony Round	<p>Select the ceremony round.</p> <p>Note: The percent sign is used to select all ceremony rounds where start date alias instance comes before the concurrent process run date and whose end date alias instance comes after the concurrent process run date.</p>
Program	Select the program code for which eligible graduands are identified.
Program Location	Select the program location.
Award	Select the award.
Include Nominated Completion Candidates	<p>Select Yes or No.</p> <p>If you choose Yes, nominated completion candidates are included.</p> <p>This is a mandatory parameter.</p>
Include Derived Completion Candidates	<p>Select Yes or No.</p> <p>If you choose Yes, derived completion candidates are included.</p> <p>This is a mandatory parameter.</p>
Restrict to Requirements Complete	<p>Select Yes or No.</p> <p>If you choose Yes, graduand records are created only for students whose program requirements are complete.</p> <p>This is a mandatory parameter.</p>
Potential Graduand Status	<p>Select the potential graduand status.</p> <p>Note: Institution-defined statuses are entered in the Graduand Statuses window.</p> <p>This is a mandatory parameter.</p>
Eligible Graduand Status	<p>Select the eligible graduand status.</p> <p>Note: Institution-defined statuses are entered in the Graduand Statuses window.</p> <p>This is a mandatory parameter.</p>
Graduand Approval Status	<p>Select the graduand approval status.</p> <p>You can choose either Waiting or Approved. This is based on institutional process for approving student graduation.</p> <p>This is a mandatory parameter.</p>

Table 6–36 (Cont.) Identify and Create Graduands Parameters

Parameter	Description
Graduated Status	Select the status to be given to graduated students.
Approval Status for Graduated	Select the approval status for graduated students.

6.8.1.10 Automatically Assigning Graduands to Ceremony

The Manage Allocation of Graduands to Ceremonies concurrent process allocates graduands to specific ceremonies within a ceremony round and creates graduand award ceremony records.

This concurrent process is run by a graduation administrator once per ceremony round for initial allocation and as required after the Identify and Create Graduands concurrent process is run. The graduand award ceremony records created by this concurrent process are accessed by the Set Graduand Order in Presentation concurrent process.

Prerequisites

Graduand records exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Obtain Council Approval concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Manage Allocation of Graduands to Ceremonies concurrent process.

Table 6–37 Manage Allocation of Graduands to Ceremonies Parameters

Parameter	Description
Ceremony Round	Select the ceremony round for which graduands are to be allocated. This is a mandatory parameter.

Table 6–37 (Cont.) Manage Allocation of Graduands to Ceremonies Parameters

Parameter	Description
Program Location Code	Select the program location code to assign graduands to graduation locations and venues associated with the appropriate campus. Note: This parameter is used if graduation management is decentralized.
Graduand Status	Select the graduand status. This is an institution-defined status, equivalent to either Potential or Eligible .
Stalemate Resolution	Select the type of distribution in case of a stalemate where graduands satisfy criteria for more than one ceremony. You can choose None if graduands are not allocated to any ceremony for award, Alpha Distribution to allocate graduands alphabetically, and Numeric Distribution to allocate graduands proportionally. For example, if two possible ceremonies exist, half of the graduands are assigned to one ceremony, half to the other. This is a mandatory parameter.
Ignore Graduand Primary Unit Sets	Select Yes or No . If you choose Yes , graduand primary unit sets are ignored. Note: Yes is chosen if allocations are at program award level, including awards with recorded unit set groups. This is a mandatory parameter.

6.8.1.11 Obtaining Council Approval

Eligible graduands are assigned to a ceremony, and formal approval by the university graduation council is required before they are allowed to graduate. The Obtain Council Approval concurrent process produces a list of such graduands for approval.

This concurrent process is run by a graduation specialist before University Council meetings at the end of a graduation round or as required.

This concurrent process produces the Graduation Council Approval List, grouping graduands by award within an organizational unit. The report includes graduands with graduand status of **Eligible**, approval status of **Waiting** or **Approved**, and graduand type of **Attending** or **In Absentia**.

Prerequisites

Graduands are assigned to a ceremony.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Obtain Council Approval concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Obtain Council Approval concurrent process.

Table 6–38 Obtain Council Approval Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report.
Ceremony Round	Select the period of time when a set of graduation ceremonies are conducted. This is a mandatory parameter.
Ceremony Number	Select the ceremony number. This is a mandatory parameter.
Location	Select the location of the campus.
Organizational Unit	Select the organizational unit.
Award	Select the award.
Program	Enter the program code.
Graduand Approval Status	Select the graduand approval status. You can choose either Waiting or Approved to display the appropriate graduands.
Signatory Block	Enter text for the signature.
Print Signature Block At	Select Organizational Unit Level or the Report Level to specify whether signature block is to be shown after each organizational unit or only at end of report.

6.8.1.12 Assigning Graduand Status

Run the Assign Graduand Status concurrent process to check the academic eligibility of the graduands and update the graduand status to either **Eligible** or **Potential**.

For completed student program attempt and student program attempt award aim records, the graduand status is updated to **Eligible**. For incomplete student program attempt and student program attempt award aim records, the graduand status is updated to **Potential**.

This concurrent process accesses graduand records that are created by the Identify and Create Graduands concurrent process or by entering graduands in the Graduand Details window.

This concurrent process is run nightly by a graduation specialist.

Prerequisites

Graduand records exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Assign Graduand Status concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Assign Graduand Status concurrent process.

Table 6–39 Assign Graduand Status Parameters

Parameter	Description
Eligible Graduand Status	Select the eligible graduand status. This is a mandatory parameter.
Potential Graduand Status	Select the potential graduand status. This is a mandatory parameter.
Graduated Status	Select the status to be given to graduated students.

Table 6–39 (Cont.) Assign Graduant Status Parameters

Parameter	Description
Approval Status for Graduated	Select the approval status for graduated students.

6.8.1.13 Assigning Approval Status and Conferral Date

The Ceremony Graduands window displays graduands at ceremony round, ceremony, award, or unit set group level. The approval status and conferral date are set for the selected set of graduands.

When accessed from the Graduation Ceremony window, it lists graduands in a ceremony round or for a particular ceremony.

Prerequisites

Graduands are assigned to ceremonies.

Navigation

Academic Records > Graduation > Graduation Ceremony > Graduands

Additional Notes

You can also open the Ceremony Graduands window from the following locations:

- When accessed from the Award Ceremony window, it lists graduands for a specific honorary or program award within a ceremony.

Academic Records > Graduation > Award Ceremony > Graduands

- When accessed from the Unit Set Ceremony window, it lists graduands for a particular unit set group in a program award and ceremony.

Academic Records > Graduation > Award Ceremony > Unit Set Groups > Graduands

Graduands are listed either according to the order number assigned to them indicating their place in the ceremony, or in alphabetical sequence if they have not yet been assigned an order number. Students graduating in absentia are not given an order number.

Click **Edit Graduant** to change statuses and other graduand details in the Graduant Details window.

You can set the approval status and conferral date for the displayed records using the **Set Approval All** and **Set Conferral Date All** buttons.

Validations

The following validations apply:

- You cannot set the approval status for graduands with a graduation hold.
- You can set the conferral date and Graduated status only for graduands with an **Eligible** graduand status, an **Approved** approval status, or graduand type of **Attending** or **Inabsentia**.
- Once approved statuses and conferral dates are recorded, you can change them only at the individual graduand level, in the Graduand Details window.
- You cannot change the graduand type after students are recorded as graduated. Graduation ceremonies are finalized before setting conferral dates and graduated statuses.

6.8.1.14 Assigning Graduand Order in Presentation

The Set Graduand Order in Presentation concurrent process sets the award presentation order numbers for graduands. It ensures the correct presentation order for each graduand attending a graduation ceremony based on data entered in the Award Ceremony and Unit Set Ceremony windows. For each ceremony, graduands are numbered sequentially.

This concurrent process selects only the following graduands:

- Graduand status of either **Eligible** or **Graduated**
- Graduand approval status of **Approved**
- Graduand type of **Attending**

For each ceremony, the concurrent process accesses graduand award ceremony records representing graduands allocated to the ceremony. Graduands can have more than one record if they receive more than one award at the ceremony, as in the case of a combined degree.

If a ceremony consists of graduands receiving program awards and those assigned to a unit set group, the unit set group members are placed before program award members.

This concurrent process is run by a graduation specialist as required. This concurrent process uses graduand award ceremony records created by the Manage Allocation of Graduands to Ceremonies concurrent process.

Prerequisites

Eligible graduands exist.

Award and unit set ceremony details exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Set Graduand Order in Presentation concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Set Graduand Order in Presentation concurrent process.

Table 6–40 Set Graduand Order in Presentation Parameters

Parameter	Description
Ceremony Round	Select the ceremony round. This is a mandatory parameter.
Order Graduands By	Specify the ordering criteria. If you choose Alphabetical , all graduands, including honors graduands, ordered alphabetically. If you choose Honors Level , all graduands are ordered by rank, and then alphabetically within that rank. This is a mandatory parameter.
Ignore Unit Sets	Enter Yes or No . You can choose Yes to group graduands according to the order specified in the Award Ceremony window, ignoring unit set groups if any. This is a mandatory parameter.
Announce Multi Award Graduands Once	Enter Yes or No . You can choose Yes to assign only one sequence number to graduands receiving multiple awards in the same ceremony. This is a mandatory parameter.

6.8.1.15 Setting Graduand Seating Order

The Graduation Ceremony Seating and Order of Presentation List concurrent process produces a report listing seat allocations and the presentation order of graduands.

This concurrent process is run by a Graduation specialist as required before graduation ceremonies.

Before running this concurrent process, initial ordering of graduand groups is performed at the award level or at the unit set group level, in the Award Ceremony and Unit Set Ceremony windows respectively. After graduands in a particular ceremony are identified, each attending graduand is allotted an order number within a ceremony by running the Set Graduand Order in Presentation concurrent process. Seat numbers are allocated manually in the Graduand Ceremony Details window.

This concurrent process produces the Seating and Order of Presentation List report based on the presentation order or seat numbers for a particular ceremony round, ceremony, or venue.

Prerequisites

Graduands are allocated seating and presentation order.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Graduation Ceremony Seating and Order of Presentation List concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Graduation Ceremony Seating and Order of Presentation List concurrent process.

Table 6–41 Graduation Ceremony Seating and Order of Presentation List Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report.

Table 6–41 Graduation Ceremony Seating and Order of Presentation List Parameters

Parameter	Description
Ceremony Round	Select the ceremony round to restrict list to ceremony round entered. This is a mandatory parameter.
Ceremony Number	Select the ceremony number to restrict list.
Venue	Select the venue to restrict list.
Display	Enter the level of detail required in list.
Sort Order	Select the criteria for sorting list.

6.8.1.16 Producing a Register

The Produce a Graduate Register concurrent process produces a register including details of each graduand.

The Produce a Graduate Register concurrent process is run by a graduations specialist after graduation rounds, or as required. It produces a graduate register, displaying graduands, awards, honors levels if applicable, unit sets, and conferral details.

Prerequisites

Graduand records exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Produce a Graduate Register concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Produce a Graduate Register concurrent process.

Table 6–42 Produce a Graduate Register Concurrent Process Parameters

Parameter	Description
Runtime Comment	Enter the comment that appears on the header page of the report
Ceremony Round	Select the ceremony round.
Ceremony Number	Select the ceremony number. This is a mandatory parameter.
Conferral Date	Enter the date award is officially given.
Award	Select the award given.
Program	Select the program.
Unit Set	Select the unit set.
Sort Report By	Select the criteria for sorting list.

6.8.1.17 Maintaining Graduand Records

The Clean Up Graduand Records concurrent process deletes records for graduands with a **Potential** status who did not graduate or did not get approval to graduate in a ceremony round. It also deletes any dependent graduand award ceremony records.

This concurrent process is run by a Graduations specialist as required at the completion of a ceremony round. This concurrent process accesses graduand records created by the Assign Graduand Status concurrent process.

Prerequisites

Graduands without an approval to graduate exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Additional Notes

Run the Clean Up Graduand Records concurrent process. For information on running a concurrent process, see [Concurrent Process Procedures](#).

This concurrent process has a single parameter, Ceremony Round. Select the ceremony round to be cleaned up. This is a mandatory parameter.

Because this concurrent process deletes records from the database, the selected ceremony round must be complete.

6.9 Processing Degree Audit

6.9.1 Overview

Degree audit is a process of matching program requirements against courses taken, ensuring that student takes the right courses to get a degree. A degree audit report is an academic advising document that maps student degree requirements against student academic transcript. The purpose of the audit report is to provide information to assist in academic planning and appropriate course scheduling each semester. The audit indicates the program and graduation requirements that have been completed as well as those areas requiring completion prior to graduation.

A third party degree auditing application such as Degree Audit Reporting System (DARS) or other degree auditing application software is used for customized functionality not supported in Oracle Student System such as the electronic evaluation of units external to the current educational institution.

A degree audit application interface is used to transfer student information stored in Oracle Student System to a third-party degree audit software. The information is processed and returned to update Oracle Student System.

An administrator, advisor, or student can request degree audit through self-service. The external system receives the request, processes it, and sends the report to Oracle Student System. The requestor receives a notification on completion and can view the report in Oracle Student System.

The administrator submits a degree audit request for students who have completed their degree requirements, and uses the results of the request to complete the student program attempts.

When academic institutions use a GPA other than that provided by Oracle Student System, the GPA is calculated by an external system. For example, special academic statistics such as Major or Minor GPA are calculated by the external system, and the returned statistics are integrated into Oracle Student System. The administrator usually submits such a request at the end of the term.

Degree audit in Oracle Student System consists of the following tasks:

- [Creating and Submitting Requests](#)
- [Processing Requests](#)

- [Viewing Reports](#)
- [Purging Degree Audit Reports](#)

6.9.2 Creating and Submitting Requests

A student, advisor, or administrator submits a degree audit request in self-service. You can configure the degree audit system to your own requirements and define functionality available in self-service. This configuration information defines the default behavior of the data that will be sent to the external software. For details on configuring degree audit system, see *Degree Audit in Oracle Student System Implementation and Administration Guide*.

Self-service requestors choose from the list of request types available for the given responsibility. The educational institution defines the level of access that the requestor has to the report. For example, you can choose to give a faculty member advising access where the faculty can perform advising tasks.

The requestor can choose the parameters for the request and preview the request details before submitting. Once submitted, the details are passed on to the XML interface for processing.

6.9.3 Processing Requests

The XML Gateway accepts incoming XML documents and initiates the process to update data in Oracle Student System. The Request document contains the necessary information required by the external degree audit system to process a degree audit.

The degree audit XML interface is used as a means of communication between Oracle Student System and external degree audit systems. After a degree audit request is placed in self-service, a workflow process initiates the XML interface to XML Gateway. The XML Gateway compiles a Request XML document using the data in Oracle Student System and sends it to the external system, which processes the request. The Request XML document contains the request type, parameters for processing, and student academic history information required by the external system to complete the degree audit.

A Request XML document can contain details of one or more students. The external system processes the data and returns a Reply XML document to Oracle Student System containing a degree audit report, calculated GPA, or degree completion requirements.

When you submit a request in self-service, the Submit Request Raise business event (oracle.apps.igs.da.xml.reqsubm) is invoked with the batch ID of the request. See Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide* for information on these business events.

For more information on creating workflows for business events, see *Oracle Workflow Guide*.

The Submit Request Receive event (oracle.apps.igs.da.xml.receive) starts the process and transfers the batch ID to the Collect and Validate function. This function verifies the data for processing, collects the required parameters, and passes them on to the Generate Trading Partner XML document function, which generates and returns a valid XML document.

The workflow Send Event then sends this document to the Trading Partner. The message delivery status is reported to the workflow process, and a notification is sent to the requestor.

After the Reply is received from the external system, it is processed and stored within Oracle Student System and the request status in the self-service page is updated to Completed.

The oracle.apps.igs.da.xml.receive business event is raised when a reply is received from the degree audit trading partner.

The oracle.apps.igs.da.xml.rcverr business event is raised when there is an error in receiving a reply from the degree audit trading partner.

See Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide* for information about these business events.

For information on creating workflows for business events, see *Oracle Workflow Guide*.

6.9.4 Viewing Reports

After the request is processed, requestors can view the report in self-service. Administrators and advisors can view the reports of students and release the reports to students.

6.9.5 Purging Degree Audit Reports

The Degree Audit Purge Request Report concurrent process purges Degree Audit Requests that have been processed from Oracle Student System. This process

generates a report of the records purged from Oracle Student System so that purge requests can be audited later.

Prerequisites

Degree audit requests are submitted.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Degree Audit Purge Request Report concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Degree Audit Purge Request Report concurrent process:

Table 6–43 Degree Audit Purge Requests Report Parameters

Parameter	Description
Start Date	Start date for the purging of request records.
End Date	End date for the purging of request records.
Request Number	Select the request number.
Requestor	Select the requestor name and ID.
Responsibility	Select the self-service responsibility with which the request was submitted.
Request Status	Select the request status. You can choose from Completed , Error , or Submitted .
Request Type	Select the request type. You can choose from Degree Audit , Degree Completion , GPA Calculation , or Transfer Evaluation .

6.10 Ordering and Producing Documents

6.10.1 Overview

Administrators and students can order transcripts and enrollment certificates in self-service. Administrators can also enter comments for transcripts in self-service. Students and advisors can view these comments and they are printed on the transcripts.

Producing documents includes the following:

- [Producing Transcripts](#)
- [Producing Enrollment Certificates](#)
- [Updating Order and Item Statuses](#)

6.10.2 Producing Transcripts

Producing transcripts involves the following tasks:

- [Producing Transcripts for US](#)
- [Producing Transcripts for UK](#)
- [Placing Bulk Order for Transcripts](#)

6.10.2.1 Producing Transcripts for US

Run the Produce Transcript - US concurrent process to perform the following tasks:

- Print transcript for a single student with an order line items status of In Process in self-service.
- Print transcripts for all order line items with status of In Process based on the selection criteria in the concurrent process.
- Print transcripts for all order line items with status of In Process per a specified schedule.

Prerequisites

Document processing options and delivery method types are defined.

Printer configuration is set up.

In process transcript requests exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Produce Transcript - US concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

To produce a transcript for a single student, specify Student Number or Student Number and Document. For a group of students, specify Organization Unit, Career. To print a single transcript, specify Item Number.

- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Produce Transcript - US concurrent process:

Table 6–44 Produce Transcript - US Parameters

Parameter	Description
Test Mode	Select Yes or No . This is a mandatory parameter. If you choose No , the document status in the interface table is updated to <i>Processed</i> .
Student Number	Enter the student number and name. The list of values displays only those students with incomplete transcript requests.
Document	Enter the document number
Document Type	Select the type of document to be produced. You can choose either Official Transcript or Unofficial Transcript .
Delivery Method	Select the delivery method of the transcript. You can choose from Courier, Fax, Mail, Overnight, Pick Up, or Priority methods.
Requests to be Included	Select the requests to be included in the concurrent process. You can choose from All Requests, Requests for Organization Unit and/or Career, or Requests that have Include All Work at the Institution .
Organization Unit	Select the organization unit.

Table 6–44 (Cont.) Produce Transcript - US Parameters

Parameter	Description
Career	Select the career.

The concurrent process checks if the documents requested are ready for production. If a document is to be produced manually due to missing academic history, the concurrent process displays the details in the report as an exception.

When a document request is complete, the interface tables and the Order Item Details in self-service are updated with a Completed status and a notification is sent to the requestor. A business event is raised to send a notification to each student about the production of transcript.

6.10.2.2 Producing Transcripts for UK

Additional Notes

- The Produce Transcript - UK concurrent process produces transcripts for a program, unlike the career based transcripts produced for the United States schools. For details, refer [Producing Transcripts for US](#).
- Run the Produce Transcript - UK concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- To set the parameters, refer to the following table.

The following table describes the parameters for the Produce Transcript - UK concurrent process:

Table 6–45 Produce Transcript - UK Parameters

Parameter	Description
Test Mode	Select Yes or No . This is a mandatory parameter. If you choose No , the documents' status in the interface table is updated to <i>Processed</i> .
Student Number	Enter the student number and name. The list of values displays only those students with incomplete transcript requests.

Table 6–45 Produce Transcript - UK Parameters

Parameter	Description
Document	Enter the document number.
Document Type	Select the type of document to be produced. You can choose either Official Transcript or Unofficial Transcript .
Delivery Method	Select the delivery method of the transcript. You can choose from Courier, Fax, Mail, Overnight, Pick Up, or Priority methods. The delivery method types are set up in the Delivery Method Types window.
Requests to be Included	Select the requests to be included in the concurrent process. You can choose from Requests for Organization Unit and/or Career or Requests that have Include All Work at the Institution .
Organization Unit	Select the organization unit.
Program	Select the program.

6.10.2.3 Placing Bulk Order for Transcripts

Administrators can place bulk orders for official or unofficial transcripts in self-service. They must specify the method of delivery, purpose, number of copies, and order description. They can place orders for the currently enrolled careers or for all academic history. The Place Bulk Order concurrent process is initiated to process the request.

6.10.3 Producing Enrollment Certificates

Producing enrollment certificates involves the following tasks:

- [Producing Enrollment Certificate - US](#)
- [Producing Enrollment Certificate - UK](#)

6.10.3.1 Producing Enrollment Certificate - US

The Produce Enrollment Certificate - US concurrent process performs the following tasks:

- Print documents for a single student

- Print a set of documents based on the selection criteria
- Print a set of documents based on selection criteria per a specified schedule

For a specific student, specify the Student Number or Student Number and Document. For a group of students, specify Organization Unit, Career. To print a single enrollment certificate, specify Item Number.

Prerequisites

Document processing options and delivery method types are defined.
Printer configuration is set up.
Inprocess requests exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Produce Enrollment Certificate - US concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Produce Enrollment Certificate - US concurrent process:

Table 6–46 Produce Enrollment Certificate - US Parameters

Parameter	Description
Test Mode	Select Yes or No . This is a mandatory parameter. If you choose No , the document status in the interface table is updated to PROCESSED.
Student Number	Enter the student number and name.
Document	Enter the document number.

Table 6–46 Produce Enrollment Certificate - US Parameters

Parameter	Description
Delivery Method	Select the delivery method of the enrollment certificate. You can choose from Courier, Fax, Mail, Overnight, Pick Up, or Priority methods. The delivery method types are set up in the Delivery Method Types window.
Requests to be Included	Select the requests to be included in the concurrent process. You can choose from Academic, Term, or All Requests .
Term	Select the term for which transcript is to be produced.
Organization Unit	Select the organization unit.

When a document request is complete, the interface tables are updated with a status of Completed and a notification is sent to the requestor. A business event is raised to send a notification to each student about the production of enrollment certificate.

6.10.3.2 Producing Enrollment Certificate - UK

For details, refer [Producing Enrollment Certificate - US](#).

6.10.4 Updating Order and Item Statuses

Students or administrators can place a request for documents in self-service. When a document request is complete, the interface tables are updated with a status of Completed. An external system is given the option to pick up the data from the interface tables to print the document, or convert it into XML or other convenient means.

Run the Update Order and Item Statuses concurrent process to update the status to Completed in the Oracle Student System tables.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Update Order and Item Statuses concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

There are no parameters for this concurrent process. When you submit the request, a message displays the request ID.

The Advising subsystem allows you to perform a number of tasks related to the advising process.

This chapter contains the following topics:

- [Advising Overview](#)
- [Running Concurrent Processes](#)
- [Creating User Defined Lookup Values](#)
- [Creating Workflows for Business Events](#)

7.1 Advising Overview

The Advising subsystem's functionality is made up of the following five main procedures:

- Creating and maintaining advising groups
- Selecting and attaching advisors to advising groups
- Selecting and attaching students to advising groups
- Matching students to advisors
- Maintaining matches

Other tasks include:

- Searching for information on advisors, advising groups, and students
- Viewing and modifying information on advisors, advising groups, and students
- Applying and releasing Holds

- Requesting Degree Audits

Note: All of the Advising functionality for Oracle Student System is available through Self-Service. Click the Help icon in the Self-Service: Advising pages for information about each page.

7.2 Running Concurrent Processes

There are three concurrent processes that need to be run periodically within the Advising subsystem:

- [Maintain Advising Group](#)
- [Generate Advising Notifications](#)
- [Apply Advising Hold](#)

Maintain Advising Group

You run the Maintain Advising Group concurrent process to:

- Determine the advisors and students that qualify to be added and/or removed from an advising group
 - Inserts the new students and advisors in the respective Advising tables
 - End dates the advisors and students that no longer qualify to be part of the advising group
 - If Automatically Accept Advisor/Student Additions/Removals is selected, then the changes are finalized in the Advising tables
- Pair unmatched students with available advisors
 - Equitably distributes the unassigned students to the available advisors
 - Inserts the new advisors and students pair rows in the respective Advising table
 - If Automatically Accepts Advisor/Student Pairs is selected, then the changes are finalized in the Advising tables

Prerequisites

Advising groups are defined with respective Person ID Groups and Holds.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Maintain Advising Group concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Maintain Advising Group concurrent process.

Table 7–1 Maintain Advising Group Parameters

Parameter	Description
Advising Group Name	List of active advising groups. If the value is passed from within Oracle Student System, processing needs to be done only for the passed group name. Otherwise, all active groups should be processed.
Apply Advising Holds	Indicate Y/N whether to create Advising Holds against the students in groups with an Advising Hold Type defined.
Generate Advising Notifications	Indicate Y/N whether to generate advising group assignment or removal Notifications to students and advisors.

Generate Advising Notifications

You can run the Generate Advising Notifications concurrent process to send notifications to advisors and students when they get assigned to an advising group, or when their association with an advising group is terminated.

Prerequisites

Advising groups are defined with respective Person ID Groups and Holds.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Generate Advising Notifications concurrent process.

See Running a Concurrent Process (Linked to common set of instructions to run a concurrent process).

2. This process has a single parameter, Advising Group. This is a mandatory parameter that lists all active advising groups. If an advising group is selected,

the search is limited to any additions/removals to students and advisors for that particular advising group.

Apply Advising Hold

You can the Apply Advising Hold concurrent process to apply Advising holds on students in those advising groups selected to be included.

Prerequisites

Advising groups are defined with respective Person ID Groups and Holds.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Apply Advising Hold concurrent process.
See Running a Concurrent Process (Linked to common set of instructions to run a concurrent process).
- 2. To set the parameters, refer to the following table.

The following table describes the parameter for the Apply Advising Hold concurrent process.

Table 7–2 Apply Advising Hold Parameter

Parameter	Description
Advising Group	List of active advising groups in the system that have Advising_Hold_Type not null.If an advising group is selected, the search is limited to any students who need to be put on hold to the particular advising group

7.3 Creating User Defined Lookup Values

Users assigned the OSS Administrator role can create lookup values reflecting specific advising groups under the Data Element Name **Advising_Cat**. For example, an administrator can define lookup values for groups such as academic advising groups and athletic advising groups, based on individual institutional needs.

7.4 Creating Workflows for Business Events

For more information, see the Workflow chapter in the *Oracle Student System Implementation and Administration Guide*. For information on creating workflows for business events, see *Oracle Workflow Guide*.

Student Finance

Student Finance manages financial transactions and accounting activities that determine student charges and credits for a specific study period. This chapter contains conceptual information, detailed descriptions of the Student Finance functionality, and instructions for using the module.

The chapter details the following topics:

- [What's New in this Release](#)
- [Student Finance Overview](#)
- [Processing Deposits](#)
- [Calculating Charges and Credits](#)
- [Generating Billing Extracts](#)
- [Working with Holds](#)
- [Payment Plans](#)
- [Administering Student Sponsorships](#)
- [Generating Refund](#)
- [Interfacing with General Ledger](#)

8.1 What's New in this Release

In this release, Oracle Student System has the following new and modified features:

- [Payment Plans](#)
- [Audit and Special Fees](#)
- [Automatic Holds Release](#)

8.1.1 Payment Plans

Using payment plans you can break up the total amount due into multiple installments that the student pays over a period of time. To implement a payment plan, you must define a master payment plan template, assign and maintain student payment plans, and record installment payments.

8.1.2 Audit and Special Fees

Audit fees for units and special fees for unit sections are now taken into consideration for assessing student fees.

Student auditing units are not charged anything for audited units or unit sections, however, they may be charged an audit fee instead of regular tuition. Students do not earn credit points for audited units or unit sections.

Special Fees are fees that are charged over and above the regular tuition fee. For example, a lab fee can be charged for a particular unit section in addition to the regular tuition fee.

With this release, the fee assessment process assesses both audit and special fees.

8.1.3 Automatic Holds Release

Financial holds on students are now released automatically when a student pays the required fees through self-service. When payment is received through the Student Finance office (over-the-counter), self-service payments, Financial Aid disbursements, or lockbox, the Process Release of Finance Holds is invoked by the Credits API server side process to automatically release holds at all balance levels on the student. Fee Type holds on students are automatically released when students make designated payments through self-service.

This allows students to continue the enrollment and registration process without manual intervention from fee administrators to release holds.

8.2 Student Finance Overview

Using Student Finance you can manage admission and enrollment related student fees. You can also generate bills, apply and release holds, and make refunds to students or their sponsors.

The Student Finance overview section consists of the following:

- [Processing Deposits](#)

- Calculating Charges
- Fee Assessment
- Calculating Credits
- Generating Receipts
- Generating Billing Extracts
- Administering Sponsorship
- Payment Plan
- Calculating Credits
- Generating Refunds
- Interfacing with General Ledger
- Commercial Receivables
- Self-Service

Unless otherwise noted, the required responsibility for performing the above tasks is Oracle Student System Super User.

8.2.1 Processing Deposits

When accepting an admission offer, the prospective student can choose to accept the offer immediately or request deferment to a later term. In either case, a deposit may be required from the student as a commitment to enroll in the institution when offered admission.

There are two types of deposits: Enrollment and Other. An Enrollment deposit is the amount paid by a student as an acceptance of the admission offer. An Other deposit is the partial amount paid for expenses such as housing, lab use, and computer rentals.

Enrollment or Other deposits can be mailed to the institution or paid over the counter.

Once a deposit has been received, you can transfer, reverse, or forfeit both deposit types. When the student enrolls, all deposits can be transferred to the student's account as credits. The deposit is reversed if there is an error, or if the check is not honored by the bank. If the student fails to enroll, the deposit is forfeited by the student and recognized as revenue by the institution.

8.2.2 Calculating Charges

On enrollment, the institution levies charges on the student. Examples of these charges include tuition, housing, and parking fees. Charges can be broadly categorized into:

- **Educational:** Tuition and transcript fees
- **External:** Any fees and fines generated outside of Oracle Student System
- **Ancillary:** Institution defined charges. Examples include housing, meals, and laboratory use.
- **Aid Adjustment:** Charges created due to reduction in student aid disbursements.

8.2.3 Fee Assessment

The fee assessment process calculates student fees based on the student's enrollment status and the number of programs in which the student enrolled. The residency status of a student also effects fee assessment. For example, if a student is from a different state than the state in which the university is located, the student may have to pay an extra amount. Attendance mode and attendance type are other factors that might increase or decrease student fees.

Fee assessment can be run in four different modes: actual, initial, predictive, and combined. Predictive fee assessment is run if students want to know the cost of attending a program in advance.

Fee assessment can be processed by three methods: *Assess by Program*, *Assess by Career*, and *Assess by Primary Career*. If the *Assess by Program* mode is selected during setup, predictive fee assessment can be run for the following four program enrollment statuses:

- Enrolled
- Intermint
- Inactive
- Unconfirmed

For *Assess by Career* and *Assess by Primary Career*, there are only three program attempt statuses: **Inactive**, **Enrolled**, or **Intermit**. These statuses are required to identify the key program in case of *Assess by Primary Career* mode. Predictive mode is only available under *Assess by Program* method.

The Fee Assessment concurrent process calculates student tuition charges. Student charges depend on the following:

- Programs and units
- Number of units attempted
- Attendance Type
- Load Calendar: A load calendar calculates the number of classes attended by a student or the credit points earned during an academic term.

For more information, see the *Oracle Student System Implementation and Administration Guide*.

8.2.4 Calculating Finance and Late Charges

Once a charge is created on a student account, the student must pay within the specified period. If the charge is not paid, a late fee or finance charge may be applied, depending on the institution's policy.

To levy a finance or late charge, you define and set up a finance charge or late fee plan, and then run the Finance and Late Charges concurrent process. Finance and Late charges are always created through this concurrent process. For more information, see the *Oracle Student System Implementation and Administration Guide*.

8.2.5 Payment Plan

Students often need to pay significant amounts of money as tuition and housing charges while pursuing an education. To help students pay these charges in installments, you can use the Payment Plan functionality in Student Finance.

To implement a payment plan, you first define a master payment plan template as part of the setup and store the template. You can later assign the template to students, activating the plan. A student can be assigned only one plan at any given point of time that can be adjusted later to suit the student's changing needs. When students pay all the installments from an existing plan, a new plan can be assigned to them.

A payment plan can be closed after a student pays all the installment amount. A payment plan can also be disqualified if the student fails to pay the installment amount for a long period of time.

The payment plan for a specific student can be altered any time. Any changes in the payment plan for the student requires manual modification. Students are assigned

only instances of a payment plan template. So when you modify a student payment plan, that specific instance is modified and not the main master plan template.

Students can make installment payments at any designated payment site, such as the Student Finance or Accounting office, through lockboxes, or using the self-service pages.

If a student fails to pay the installments within the due date of each month, finance and late charges are applied to the student. For more information on finance and late charges, see [Calculating Charges and Credits](#) and [Working with Holds](#).

8.2.6 Calculating Credits

In Student Finance, payments are called credits. Credit modes include:

- **Over-the-counter (OTC Receipts):** Payments made at designated payment sites, such as the Student Finance or Accounting office.
- **Self-service payments:** Payments made online through credit cards
- **Financial aid credits:** Payments received as financial aid from federal or other sources
- **Sponsor payments:** Aid received from organizational, individual, or other sponsors
- **Lockbox:** Payments received through bank accounts maintained by the institution to collect student payments
- **Deposit:** Deposits transferred as credits
- **Credits from External Systems:** Credits from external systems, such as cashiering systems and auxiliary operations that are added to the student account using the Credits API.
- **Negative Charge Adjustments:** Credits created as a result of a downward adjustment to tuition charges.

8.2.7 Generating Receipts

Students can make payments in cash, by check, or by using a credit card. For every payment made over the counter, Student Finance generates the appropriate receipt. Receipts can also be generated using self-service.

While creating receipts through the transaction windows, you must associate a credit type and credit class to a receipt. Whereas, in self-service, a credit transaction

is assigned to a credit type based on the designated payment selected by the student while making payments.

8.2.8 Administering Sponsorship

Sponsorship is another important source of student credit. Students can be sponsored by individuals, external bodies or corporations. Student Finance takes into account all such sponsor amounts and calculates them as credits.

Using the Student Finance subsystem, you can maintain details of the sponsor-student relationship. After a student is assigned to a sponsor, the financial aid administrator or the business office maintains details of sponsor payments and tracks the percentage of the fees or the amount the sponsor is willing to pay. Managing sponsorships involves the following:

- Assigning students to a sponsor
- Maintaining student sponsorship details

8.2.9 Generating Billing Extracts

Oracle Student System provides a bill extract functionality to generate bills. The billing extract includes charges and credits for the period being extracted. It also includes information, such as billing address information, remittance address information, financial aid and sponsorship planned credits, due date, and payment plan installment information. You can use this information to produce invoices that can be sent to students and sponsors. The student's and sponsor's billing history can be viewed in the Account Summary window.

A billing extract contains the following:

- **Due date:** Date by which students must clear charges
- **Cut-off date:** Date beyond which the bill does not reflect transactions
- **Credits paid:** Total amount of credits paid until the bill creation date
- **Planned credits:** Credits planned but not yet realized as actual payments
- **Charge details:** Total amount of payable charge

The transactions included in the bill are marked with a bill number, bill date, and a due date.

8.2.10 Generating Refunds

Once student payments are made, balances are calculated to determine if the student is eligible for refunds. After the Mass Application concurrent process applies all credits to charges, you must run the Process Refunds for Excess Credits concurrent process. This process identifies all the students eligible for a refund, calculates the amount to be refunded, and creates a refund transaction on the student account.

If Oracle Financials is installed, refunds are disbursed through Oracle Payables. You run the Transfer Refunds to Oracle Payables to transfer refund information to Oracle Payables. If Oracle Financials is not installed, the refund information is transferred to a third party accounting solution.

8.2.11 Interfacing with General Ledger

Student Finance is closely integrated with Oracle Financials. If Oracle Financials is implemented, then all accounting data from Student Finance is posted to the central accounting ledger, called General Ledger. However, if Oracle Financials is not installed, accounting data can be posted to a non-Oracle financial system.

8.2.12 Commercial Receivables

You can choose Student Finance or any other account management system to manage the financial transactions of your institution. You set this specification in the System Options window.

Student Finance follows an account balance model rather than an invoice-model. All account management activities revolve around a student's account rather than around a single invoice.

Commercial receivables accounting management systems follow an invoice-based model where account management activities such as billing, assessing fees, and maintaining student's balances are centered around an invoice.

Your institution can use an external account management or commercial receivables system to manage all student financial activities, such as billing and account management.

When using a commercial receivables accounting management system, the following Student Finance functionalities are disabled:

- Application of credits
- Operations used to maintain balances

- OTC receipts
- Oracle Student System billing extract
- Student Finance self-service
- Financial aid
- Payment Plans
- Refunds
- Financial holds
- Finance and late charges
- Deposits
- Integration with Payables

The following Student Finance functionalities are not disabled:

- Fee calculation
- Ancillary charges
- External charges
- Financial accounting
- Sponsorships

For more information on commercial receivables, refer to the *Oracle Student System Implementation and Administration Guide*.

8.2.13 Self-Service

Using Student Finance self-service, students can make payments online for any charge on their accounts, verify account details, and print receipts for payments made. In addition, students can use self-service to pay for specific charges. These type of payments are called designated payments.

8.3 Processing Deposits

In Student Finance, there are two types of deposits: *Enrollment* and *Other*. Depending on the type of deposit, different processes are followed to create, transfer, and maintain these deposits.

The following section details how Enrollment and Other deposits are processed:

- [Enrollment Deposits](#)
- [Other Deposits](#)

8.3.1 Enrollment Deposits

As enrollment deposits are paid by the student when they apply for admission, these deposit amounts are determined by the Admission office. Deposits amounts can vary depending on the application type. For example, prospective freshman applicants to the school of business and the school of engineering can be required to pay different enrollment deposits on admission.

When a prospective student applies for multiple programs, and is offered admission to more than one, the deposit amount will be a single amount consisting of all the required enrollment deposits.

The Admission office defines the minimum enrollment requirement to meet the deposit commitment. If the student fails to meet the requirements, the deposit amount is forfeited by the student and is recorded as revenue by the institution.

The Admission office can waive the deposit for some students, if required. In such cases, the deposit amount is recorded as waived in the admission record.

For more detail on the Admission Application Process, see [Processing Applications](#), Admissions.

After an admission offer is made and accepted, the Admission office collects the deposit check and submits it to the Student Finance office after the following validations:

- The deposit amount received is correct
- The deposit amount is received prior to the offer acceptance deadline

Enrollment deposits can also be paid over-the-counter at the Student Finance office or through the lockbox, and must contain the student name, amount, date the payment is recorded in Student Finance, and the deposit type (*Enrollment* or *Other*).

For more information on the lockbox deposit payments, refer to [Importing and Processing Lockbox Data](#).

Student Finance also determines the application against which a deposit is received to identify the *load calendar* in which the student seeks admission, and to determine if the student meets the enrollment requirements for the transfer of the deposit to the student account. Enrollment deposits paid through self-service are recorded as a liability for the institution and are not recorded on the student account.

For more information, refer to [Creating a Deposit](#).

Enrollment deposits are processed based on the student enrollment status for a given academic term. For example, if the student applies for enrollment during the academic term AY04, the deposit for this student is processed in the same term. However, if the student defers admission to a later term, for example, AY06, the deposit amount is processed in that term.

8.3.2 Other Deposits

Other deposits are recorded in Student Finance through the back office windows or through lockbox, and no validations are performed on such deposits. However, **Other** deposits must have the following attributes:

- Student name
- Amount
- Date Recorded
- Deposit Type
- Academic term for which the deposit payment is made

When the Other deposit is initially recorded in Student Finance, it is recorded as a liability account for the institution.

Other deposits are transferred to the student account when you run the Process Deposit process or manually transfer the amount using the Receipts window.

Other deposits are forfeited by the student and recognized as revenue by the institution if the student fails to enroll within the given time.

For information on Reversing Enrollment and Other deposits, refer to [Reversing a Deposit](#).

The following sections apply to both Enrollment and Other deposits, unless stated otherwise.

- [Creating a Deposit](#)
- [Transferring a Deposit](#)
- [Forfeiting a Deposit](#)
- [Reversing a Deposit](#)

8.3.3 Creating a Deposit

When a student pays an **Enrollment** or **Other** deposit, the Student Finance office generates a deposit receipt. The credit class of a deposit receipt is determined by the type of deposit made, such as *Enrollment* or *Other*. The credit class further determines the attributes required for creating a deposit.

8.3.3.1 Enrollment Deposit

For Enrollment deposits, a deposit record is created with the corresponding admissions application ID to process enrollment deposit payment status for each admission application.

If the credit class is *Enrollment Deposit*, the source transaction reference displays the admission application numbers for application instances with the offer response status **Accepted** or **Deferral**, and with offer deferment status of **Confirmed**. You need to select the appropriate admission application for the deposit being paid.

In addition to the source transaction reference, enrollment deposit receipts are also assigned a source transaction type to determine the type of deposit made. When a student makes an enrollment deposit, the source transaction type defaults to *Admissions*.

8.3.3.2 Other Deposit

For Other deposit, the source transaction type are user-defined lookup values, and the source reference number can be any number that you would want to assign to the transaction.

For Other deposits, you can select the source transaction type from the available list of values, or you can define your own values to meet your requirements during implementation.

After a deposit is created, it:

- is recorded against a deferred revenue account with the status **Cleared**.
- is available for viewing through the Receipts window.
- is available to the Billing Extract process.
- has no impact on the student account balance until the deposit is transferred.
- is not available for application to charges.
- is not available to the finance and late charge process.

- is not available to the Application of Finance Holds Process or Process Release of Finance Holds Process concurrent processes.

Prerequisites

Enrollment deposit amount is defined in Admissions.

Fee type of *Enrollment* is defined in the Admission Fee Information window.

Navigation

Student Finance > Receipts

Steps

To create an Enrollment or Other deposit receipt:

1. Select the appropriate value from the list of values in the credit class field in the Receipts window.
2. Enter the party and receipt number, amount being paid as deposit, credit type, and credit instrument in the Receipts window. When you create an enrollment deposit, the credit type is displayed by default.
3. Enter the appropriate details in the Credit Card region, if you are paying by credit card or check.
4. In the Authorization Code field, enter an authorization code as returned by your credit card processor.

The Authorization Code field in the Receipts window is used to store the authorization code for informational purposes only, and not for use by the credit card fund transfer process. The back office Receipt window assumes that this is being handled through a separate credit card terminal.

5. Optionally, select the fee calendar from the list of values in the Source Transaction section.
6. For enrollment deposits, the source transaction type defaults to *Admission Application* and the Source Transaction Reference is the Application ID number.
7. For Other deposits, select the source transaction type from the user-defined lookup values. You can assign any number as the source transaction reference. This is a free flow text entry field.
8. Save your work.

9. Select **Activities Details** to view the details of all activities for a receipt and related account information, such as debit and credit account flexfield and account codes.

8.3.4 Transferring a Deposit

An Enrollment or Other deposit is transferred as a credit to the student account after the student successfully enrolls in a program.

For enrollment deposits, Student Finance verifies that the student is enrolled in the appropriate program. If yes, the deposit is transferred or else forfeited. Also, you cannot create a credit on the student account with the credit instrument as *Deposit*. You must transfer a deposit to the student account to record it as a credit.

Transfer of enrollment deposits also depends on the enrollment deposit level specified in the Application Types window in the Admissions subsystem. Given below is a list of enrollment level validations that are performed before transferring deposits:

- If the enrollment deposit level is set to *All*, then deposits are transferred irrespective of the program applied to during admission.
- If the enrollment deposit level is set to *Program*, then Student Finance matches the admission and enrolled program. If a match is found, it transfers the deposit or else forfeits it.
- If the enrollment deposit level is set to *Program Type*, then Student Finance matches the admission and enrolled program type(s). If a match is found, it transfers the deposit or else forfeits it.
- If the enrollment deposit level is set to *Application Only*, then Student Finance matches the admission and enrolled program type(s). If a match is found, it transfers the deposit or else forfeits it.

The list of values that appears in the Enrollment Deposit Levels field is system-defined data. Existing deposit levels cannot be modified and new levels cannot be added.

The following table describes the conditions under which an Enrollment or Other deposit can be transferred to a student account as credit using the **Transfer** button.

Table 8–1 Conditions for Transferring Student Deposits

Credit Class	Status	Result
Enrollment/Other	Cleared	Deposit amount will be transferred to student account without enrollment validations.
Enrollment/Other	Reversed	Deposit amount will not be transferred.
Enrollment/Other	Forfeited	Deposit amount will not be transferred.
Payment/Online Payment	Cleared	Deposit amount will not be transferred.

You can transfer a deposit manually or by using the Process Student Deposits concurrent process.

Process Student Deposits concurrent process: The Process Student Deposits concurrent process identifies the deposits of students who have enrolled in an offered program and transfers their deposits as credit to the student's account. The concurrent process transfers both enrollment and Other deposits. This concurrent process also forfeits the deposits of students who fail to enroll and recognizes the deposit as revenue for the institution.

The Process Student Deposits concurrent process does not transfer or forfeit enrollment deposits for students whose *program attempt status* in the Enrollments subsystem is **Intermit**. You need to manually transfer or forfeit the deposits for such students when they enroll in a program. If not, the deposit amount can get forfeited even if the student enrolls in the appropriate program.

Prerequisites

Deposit receipts exist.

Enrollment Deposit Levels are defined in the Application Types window in the Admissions subsystem.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Student Finance > Receipts

Steps

To transfer deposits for a group of students:

- 1. Run the Process Students Deposit concurrent process. This concurrent process performs all validation for *Enrollment* deposits. There are no validations performed for **Other** deposits.

This concurrent process is not available if the Manage Accounts field in the System Options window is set to **Null** or **Others**. For more information, see the *Oracle Student System Implementation and Administration Guide*.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, reference the following table.

The following table describes the parameters for the Process Student Deposits concurrent process.

Table 8–2 Process Student Deposits Concurrent Process Parameters

Parameter	Description
Credit Class	Select the appropriate system-defined credit class. Credit class values include: Enrollment Deposits or Others. An enrollment deposit is the initial amount paid by a student as an acceptance of the admission offer. Amounts paid for expenses, such as housing, library, and computer rentals fall under the Other deposit category. A deposit transferred to the student account is called a deposit receipt. This is a mandatory parameter.
Person Number	Select the appropriate person number. If the person number is not known, query the appropriate person number. This is an optional field.
Person ID Group	Select the appropriate Person ID group from the list of Person ID groups defined in Oracle Student System. If the Person ID group is not known query for the appropriate group. This is an optional field.
Credit Type	Select the appropriate credit type for a given Credit Class. This is an optional field. If you click on the field without selecting a Credit Class parameter, the LOV will not display any values.
Term	Select the required term from the active load periods. If the Credit Class selected is Enrollment Deposit, then Term must be specified. In case of Other Deposits, Term is an optional parameter.

Table 8–2 (Cont.) Process Student Deposits Concurrent Process Parameters

Parameter	Description
GL Date	Select the date on which the concurrent process is run. By default, the system date is taken as the GL date.
Test Mode	Select the Yes mode to trial run the process. The changes are not updated when the concurrent process is run in the test mode.

To transfer a deposit manually:

3. Query the appropriate record in the Receipts window and then select **Transfer**. This transfers the deposit amount by overriding enrollment validations.
4. To verify that the deposited amount is transferred as a credit to the student's account, query the appropriate student number in the Account Summary window and select **Credits History**.

Guidelines

Deposit statuses are:

- **Cleared**: When a student pays a deposit
- **Transferred**: When a deposit is transferred to a student account

8.3.5 Forfeiting a Deposit

A deposit amount is forfeited if the student fails to enroll in the academic term (program attempt status is **Lapsed** or **Discontinued**) and program specified in the admission application form. A deposit can be forfeited only if it is of the type *Enrollment* or *Other* with a status **Cleared**. Deposit of the type *Payment* or *Enrollment* deposit with status **Transferred** cannot be forfeited. When an amount is forfeited, the status of the deposit changes to **Forfeited** in the Receipts window.

Prerequisites

For details, see Prerequisites, Transferring a Deposit.

Navigation

Student Finance > Receipts

Steps

To manually forfeit a deposit:

- 1. Query the appropriate record in the Receipts window.
- 2. Select **Actions...1** to open the Receipt Actions window. In the Receipt Actions window, select the Forfeit check box and then select **OK**.

To forfeit deposits for multiple students:

- 3. Run the Process Student Deposits concurrent process.

For parameter-related information, refer to [Transferring a Deposit](#).

8.3.6 Reversing a Deposit

You can reverse a deposit when a deposit transfer error is made. A new record is entered in the Credits table with a negative charge equivalent to the reversed amount.

The following table describes the way a deposit is reversed in different scenarios.

Table 8–3 Reversal Scenarios

Reversal Type	Credit Class	Result
Reversal of deposit transaction	Enrollment/Other	The deposit amount will be reversed, and a new record created in the Credits table with a negative charge equivalent to the reversed amount.
Reversal of transferred credit	Enrollment/Other	The deposit amount will be reversed, and a new record created in the Credits table with a negative charge equivalent to the forfeited amount.
Reversal of forfeiture	Enrollment/Other	The deposit amount will be reversed, and a negative fee adjustment record will be created in the Charges table.

Prerequisites

For details, see Prerequisites, [Transferring a Deposit](#).

Navigation

Student Finance > Receipts

Additional Notes

To reverse a deposit, query for the student record and select the forfeit checkbox in the Receipt Action window:

Enter the GL date and select the appropriate reason from the list of values.

To verify the status of the deposit, select **Activities Detail** in the Receipts window.

8.4 Calculating Charges and Credits

Using Student Finance, you can create charges to be paid by the student or sponsor. You can create various types of charges. For more information, see [Creating and Calculating Charges](#).

A payment is recorded as a credit in Student Finance. Credits have attributes of *credit class*, *credit type*, and *credit instrument*.

A *credit class* defines the type of payments made by a student. Examples of credit classes are:

- Online Payments
- Installment Payments
- Enrollment Deposits
- Other Deposit

Credit types are user-defined records associated with a payment. *Credit instruments* indicate the mode of payment, such as cash, check, or credit-cards.

Credits are applied to charges by the Application Process. You can invoke this process manually or by running the Mass Application concurrent processes.

Excess credits can be refunded to the student. For more information, see [Calculating and Applying Credits](#).

This section consists of the following:

- [Calculating Charges and Credits](#)
- [Calculating Credits](#)
- [Application of Credits to Charges](#)
- [Fee Assessment](#)

8.4.1 Creating and Calculating Charges

In Student Finance, a charge is represented by a fee type. Fee types are used to record charges and credit types are used to record payments. For example, to create a tuition charge, you must create a fee type *Tuition*.

Fee types are user-defined. User-defined fee types can be defined for any university specific charge. For example, a user-defined fee type of *Miscellaneous* could be mapped to the system-defined fee type *Other*.

For more information on system-defined fee types, see the *Oracle Student System Implementation and Administration Guide*.

Charges can be broadly categorized into the following:

Tuition - Charges incurred by students on enrollment to programs and units. To determine tuition charges, you must run the Process Fee Assessments - Landscape or Process Fee Assessments from To Do Entries. This concurrent process takes into account various attributes, such as, enrolled programs, attendance mode and type, term of student enrollment, in order to calculate tuition charges. Tuition charges are also created in real time through self-service. For more information, refer to [Fee Assessment](#).

External - Charges originating outside Oracle Student System. For example, parking and library fees are created using third-party software. You must run the concurrent process to import these charges into Student Finance or create these charges manually. For more information see, [Creating and Importing External Charges](#).

Ancillary - Charges for supplementary services, both non-recurring and monthly charges. Examples of ancillary charges are housing, meals, and computer rentals. Based on the ancillary charge attributes imported and the rate set up for the attributes, a charge is calculated and created in the student account. You must run the Import and Calculate ancillary charges to import ancillary attributes to Student Finance. You can also manually create ancillary charges using the Ancillary window. For more information, see [Creating and Importing Ancillary Charges](#).

Financial and Late Charges - Higher education institutions can assess and apply finance charges and late fees using various criteria. These criteria include flat rate or flat amount, or calculated balance. Finance charges and late fees are calculated and posted in the student account.

Refund Charges - To enable refund transactions, a new refund charge is created and the excess credit is applied to the refund charge.

Sponsorship Charges - Charges placed on the sponsor account as a result of the sponsor process of funding a student.

Charges through Transcript Requests - Charges from self-service orders for transcripts with fee types that have a system fee type of **Document**.

Aid Adjustment Charges Through Disbursements in Financial Aid - An aid adjustment charge occurs when there is a negative adjustment to the amount of financial aid awarded to the student. The Financial Aid subsystem sends the aid adjustment to Student Finance. The Student Finance subsystem adjusts the student account by creating a charge transaction equal to the aid adjustment amount. You can view all charges for a student in the Account Summary window.

Audit and Special Fees - Students can choose to audit a unit to gain information, to review, or for skill building purposes.

Depending on your institution's policy, students auditing a unit can be charged different audit fees. The Fee Assessment concurrent process calculates all the variations of audit fees charged. For more information, see [Audit and Special Fees](#).

For some units and unit sections, your institution can charge a special fee in addition to the regular tuition fee. Special fees can be charged at various levels per your institution's requirements. Special fees can be charged as a flat rate, at unit or unit section level, program level, and for non-credit courses.

All charges are created using the Charges Application Programmable Interface, (API) and stored in Student Finance. The Charges API validates charges and stores them in the Charges table in Student Finance. The API creates rows for each charge in the Charges table to store charge attributes, such as Charge ID, amount, GL code combinations, and so on. The Charges API also interfaces with the Build API to derive the correct GL code combination for each charge and writes errors to concurrent process in real-time, along with the error messages.

You can view all charges for a student in the Account Summary window.

8.4.1.1 Creating and Importing External Charges

When billing a student, the Student Finance office includes external charges. For example, student parking fees can be calculated by the Administration department of the university and stored in a common interface table. The Student Finance office can import the external charges through this interface which is reflected in the student account.

To import the external charges into Student System, you must run the Import External Charges concurrent process to collect and transfer external charges from

the open interface into Student Finance. The External Charges Import process is available only if the Manage Account field is set to **Student Finance** or **Others**. This process is disabled if the Manage Account field in the System Options window is set to **Null**.

You can also create an external charges manually using the External charges window.

Prerequisites

Fee calendars are defined.

Fee types with the system fee type of *External* are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Student Finance > External

Steps

To import external charges into Student Finance:

- 1. Run the Import External Charges Process concurrent process.

Note: The concurrent process is not available if the Manage Account field in the System Options window is left at NULL (blank) default value. For information see, Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, reference the following table.

The following table describes the parameters for the Import External Charges Process concurrent process.

Table 8–4 Import External Charge Concurrent Process Parameters

Parameter	Description
Person Number	Select the appropriate person number. If the person number is not known, query the appropriate person number. This is an optional field.
Fee Type	Specify the fee type for which the external charges are to be imported. This is an optional field.

Table 8–4 (Cont.) Import External Charge Concurrent Process Parameters

Parameter	Description
Fee Calendar	Specify the fee calendar for which the external charges are to be imported. This is a mandatory parameter.
Fee Calendar Instance	Select the fee calendar instance for which the external charges are to be imported. This is a mandatory parameter.

In case an external charge record fails to get imported, the status of the record is marked as ERROR and the error message populated in the Error Message field in the interface table. You need to fix the error and then rerun the process.

3. To add external charges for a student without running the Import External Charges concurrent process, enter the appropriate record in the **External Charges** window. Enter the charge amount in the Charges region. The GL date defaults to the system date.

Note: If Oracle Financials is installed, then the GL date defaults to system date. If you change the system date to a different date, student system validates if the date is an open date or a future period. However, if Oracle Financials is not installed, you can still change the system date but no validation is done. The transaction date and the effective date are restricted within the fee calendar dates. The transaction date defaults to the system date.

4. Save your work.
5. In the Account Summary window, query the person name and click **Charges History** to view the student's financial charges.

Note: The Account Summary window is not available if the Manage Account field in the System Options window is left at NULL (blank) default value.

See Also

For information on how the Charges API create external charges records in Student Finance tables, see the *Oracle Student System Open Interfaces User Guide*.

8.4.1.2 Creating and Importing Ancillary Charges

Ancillary charges are levied on students for services such as housing and meals. Ancillary charges do not form part of the tuition charges and are calculated using the Ancillary fee type.

Ancillary charges are associated with ancillary segments. Each segment consists of ancillary attributes and their categories. For example, you can define the following attributes and their categories:

- Housing attribute: Two bedroom apartment or studio
- Dining attribute: Full-meals or Dinner

In the above example, a segment will be a combination of housing and dining attributes. Rates are always attached for each segment.

To calculate ancillary charges, you must create an *Ancillary* fee type and associate it with a fee calendar. This fee calendar must be available as a *Fee Type Calendar Instance*. Ancillary charges are always assessed against the Ancillary fee type, which is a fee type.

To create ancillary charges on student accounts, you must import the attributes for a student by running the Import and Calculate Ancillary Charges concurrent process.

The Import and Calculate Ancillary Charges concurrent process collects ancillary attributes for a student from the Ancillary Attributes Interface table, calculates the ancillary charges for those attributes using the rate table defined in Student Finance to create ancillary charges on student account. Ancillary Charges can also be created manually for an individual student.

For more information on, how to create an Ancillary Fee Type and set up rates for ancillary attributes, see the *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Ancillary rates are defined.

Ancillary Fee Types are associated with Fee Calendars.

Navigation

Student Finance > Ancillary Charges

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To import ancillary charges:

1. Run the Import and Calculate Ancillary Charges concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Import and Calculate Ancillary Charges concurrent process.

Table 8–5 Import and Calculate Ancillary Charges Concurrent Process Parameters

Parameter	Description
Person Number	Select the appropriate person number. If the person number is not known, query the appropriate person number. This is an optional field.
Person ID Type	Select the person ID type from the list of person ID types defined in the Oracle Student System, such as Staff and Student. This is an optional parameter.
Alternate Person ID	Specify the alternate person ID, such as the SSN number. This is an optional parameter.
Fee Calendar Type	Specify the fee calendar for which the ancillary charges are to be imported. This is an optional parameter.
Fee Type Calendar Instance	Specify the fee type calendar instance for which the ancillary charges are to be imported. This is an optional parameter.
Fee Type	Select the Fee Type for which the ancillary charges are to be imported. This is an optional parameter.

Note: Alternate Person Id cannot be null if the Person Id Type (STUDENT) is the input and the Person Number is not given as input.

3. To create ancillary charges manually, enter the appropriate person number and select the appropriate fee type and fee calendar instance.
4. Save your work.
5. Click **Attributes** to select ancillary attributes. Based upon the attributes selected the ancillary charge is created.

8.4.1.3 Resolving Ancillary Charges

The Import and Calculate Ancillary Charges process imports only ancillary charges for which rates and attributes are already defined. When calculating ancillary charges, errors can occur due to the following reasons:

- Rate is not set up for a combination of ancillary attributes imported

- Imported data items are not valid, such as the fee type and fee calendar

You must fix these errors in the Error Resolution window and run the Import and Calculate Ancillary Charges concurrent process so that it imports properly without errors.

Prerequisites

Ancillary Charges without appropriate rates are displayed in the Ancillary Charges Error Resolution window.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Student Finance > Error Resolution > Ancillary

Steps

To resolve ancillary charge errors:

1. Query the appropriate record in the Ancillary Charges Error Resolution window.
2. Correct the erroneous information, such as fee type, calendar or attributes associated with the record.
3. Run the Import and Calculate Ancillary Charges concurrent process to re-import the ancillary charges.

For parameter-related information, refer to [Creating and Importing Ancillary Charges](#).

8.4.1.4 Calculating Finance and Late Charges

Once charges are created on the student account, if they are not paid within a specific period of time, a late fee or finance charge can be levied on the student.

To levy a finance or late charge, you define and set up finance charge or late fee plans. These plans are used to calculate the late fee or finance charge. For more information, see the *Oracle Student System Implementation and Administration Guide*.

There are no restrictions on the number of finance charge or late fee plans that can be created. Deposits are not considered for finance and late charge calculation until the amount is transferred as a payment onto the student account.

Finance and Late charges are applied if students fail to pay the payment plan installment within the stipulated due date. Depending on the plan type, either a

finance charge or a late fee is applied, not both. This is defined during setup in the Finance and Late Charge payment window.

During setup, you specify an accrual type that defines the method of calculating the finance charge. For example, when you define a plan to levy a finance charge, you can specify the accrual type to be calculated based on either average daily balance past cut off date or average daily balance past due date.

In either case, the average daily balance is calculated by the overdue balance amount on the past due date and continued until the date the concurrent process is run, to calculate the finance charges.

With a late charge plan, you can specify the accrual type to be either a flat amount or a flat rate. In addition to specifying the accrual type, the fee administrators will map the appropriate student rates to the accrual type. The student rate is calculated by multiplying the daily rate by the number of days in the period.

Finance and Late Charges are applied in a different way for students on active payment plans. For more information on the business rules, refer to [Validations](#).

8.4.1.5 Running the Finance and Late Charge Concurrent Process

The Finance and Late Charges concurrent process performs the following steps:

- **Validating input parameters** - The user-specified input parameters are validated against the following rules. If any of these rules fail, then the concurrent process logs a message and exits.
 - Either the Person Group or Person should be specified. You cannot specify both the parameters.
 - Person Group must be valid and is a dynamic group.
 - Person Group must be *Active* (must not be *Closed*).
 - Creation date of the Person Group must be less than or equal to the system date.
 - Person ID must be valid.
 - Plan Name must be an active plan (not closed).
 - Batch Due Date must be greater than (>) the Batch Cutoff Date.
 - Fee Period must be an active fee type calendar instance defined for the Fee Type attached to the plan.
- **Deriving plan details from the Plan table**

- The Batch Due Date plus (+) the offset days must be less than (<) the current date.
- **Identifying Person Group to be included**
 - If the Person ID is provided, then processing is done for this person ID only.
 - In case the person group is provided, then the process is run for all the people in the group.
 - If neither the person ID nor the person group are passed as parameters, the concurrent process selects the students who have charges against them from the Charges table.
- **Determining the Payment Plan Status of a Student**
 - If the student is not associated with any payment plan, then the regular process is used to calculate the finance and late charges of the student.
 - If the student is associated with a payment plan, then the process determines the plan type selected as input parameter.
- **Determining the Balance as on the batch cut off date**
 - The concurrent process selects the balance amount from the Balances table for the person ID, Balance type, and the Batch cut off date.
 - If the payable balance is less than zero or equal to zero, no further processing is done.
- **Determining the overdue balance on the offset date**
 - The overdue balance is the balance that is derived by subtracting the credits for the student from the batch cut off date until the offset date (batch due date + offset days).
 - If the overdue balances are less than zero or equal to zero, then no finance charge or late fee is applicable on the student since the payment is made within the due date.
- **Calculating late charge based on the finance charge plan**
 - If the determined overdue balance is less than the minimum balance amount, then no charge is created.
 - If the accrual type is flat amount, then the charge amount is equated as the flat amount in the plan table.

- If the accrual type is flat rate, then the charge amount is determined as the rate (percentage) of the overdue balance. The amount calculated is rounded off to a precision of two decimal places.
- **Calculating finance charges based on the finance charge plan**
 - If the charge accrual type is 'Average Daily Balance Past Cutoff date', then for each day after the cutoff date until the current date, the daily balance is derived by subtracting the credits from the balance of the previous day starting with the payable balance.
 - If the charge accrual type is 'Average Daily Balance Past Due date', then for each day after the due date until the current date, the daily balance is derived by subtracting the credits from the balance of the previous day (starting with overdue balance as on the due date) with balance that includes all credits until the due date.
 - Next, all the daily balances are added (considering a negative balance as zero) and divided by the number of days from the offset date until the current date (system date). This is the average daily balance.
 - Finance charges are calculated as the $(\text{rate} \times \text{Average daily balance} \times \text{number of days}) / (\text{divided by}) 100$.
- **Determining the final amount to be charged**
 - If the calculated charge amount is zero, then no charge is created.
 - If the calculated charge amount is positive, it is compared with the minimum charge amount and no charge is created if the calculated charge is less than the minimum charge amount and no charge has been identified as the minimum charge amount.
 - If the calculated charge amount is less than the specified amount, then a charge is created equal to the amount of the minimum charge.
 - If the calculated charge amount is greater than this amount, then the concurrent process checks against the minimum charge amount and the maximum charge amount.
 - If the calculated charge amount is less than the minimum charge amount, then a charge equal to the minimum charge amount is created.
 - If calculated charge amount is greater than the maximum charge amount, then a charge equal to the maximum charge amount is to be created.
- **Creating final charges**

- The concurrent process determines if the charge creation date specified in the parameters is greater than the cutoff date. If not, then the concurrent process displays the message indicating that the charge creation date is older than the cutoff date.
- Finally, the concurrent process invokes the charges API to create the charges if the Test parameter is specified as No.

Prerequisites

Finance and Late charge plans are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To levy finance and late charges:

1. Run the Finance and Late Charges concurrent process. The Finance and Late Charges process calculates the charges applicable on a student as a result of late payment or non-payment of fees.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Finance and Late Charges concurrent process.

Table 8–6 Finance and Late Charges Parameters

Parameter	Description
Party Number	Select the Party Number as defined in the Person Details window. This is an optional parameter.
Person Group	Select the person group from the list of all the person groups defined in the Oracle Student System. This is a dynamic person ID group. This is an optional field. Specify only Person Number or Person ID Group. Both the parameters cannot be specified at the same time.
Plan Name	Specify a finance and late charges plan. This is a mandatory parameter.

Table 8–6 (Cont.) Finance and Late Charges Parameters

Parameter	Description
Batch Cut Off Date	<p>Select the date on which the balance amount is derived from the Balances table. On this date, the party has to make a payment of the outstanding balance before the balance is considered overdue. This is a mandatory parameter.</p> <p>The Batch Cut Off Date must be less than the Batch Due Date.</p>
Batch Due Date	<p>Select the Batch Due Date to determine the number of days beyond the Batch Cut Off Date. The concurrent process considers all payments from the Batch Cut-off date until this past due date by subtracting all payments and eligible credits from the Balance amount obtained from the Balances table to determine the overdue balance on the past due date. This is a mandatory parameter.</p> <p>The batch cutoff date and batch due date are ignored for students on payment plans if the Plan Type is Late Fee.</p>
Fee Period	Specifies the fee period during which the finance and late charges are assigned. This is a mandatory parameter.
Charge Creation Date	Select the transaction date when the finance and late charge would be created. By default, the system date is considered as the charge creation date. This is a mandatory parameter.
Test Mode	Select Yes to run the concurrent process in the trial mode. No updating is done, nor are charges created in this mode. To run in the final mode, select No. When run in the final mode, the concurrent process invokes the Charges API to create charges. This is a mandatory parameter.
GL Date	Select the date on which the transaction is posted to GL. This parameter defaults to the system date by default. You can change this date manually. This is a mandatory parameter.

Validations

The Finance and Late Charges process considers the following business rules for applying finance or late charges on a student:

For Students on an Payment Plan with Late Fee Plan

- Flat Amount Accrual type
 - If the installment is to be levied a late charge, the assessment process creates a charge on the student account for the flat amount specified.

- The student record is marked for penalty and the process continues with the next installment and starts with the determination process again. It continues until all installments selected earlier are finished assessing.
- Flat Rate Accrual type
 - If the installment is determined to require a late charge, the assessment process applies the flat rate against the amount outstanding of that specific installment.
 - The process validates the result of this calculation against the threshold information defined, such as the minimum charge, maximum charge, and Minimum charge Amount.
 - The process applies the outcome of this validation, and if a charge is to be applied, then a charge is created against the student account.
 - The student record is marked for penalty and the process continues with the next installment and starts with the determination process again. It continues until all installments selected earlier are assessed.

Note: If the process resulted in no charge, then the student record is not marked for a penalty.

For Students on an payment plan with Finance Charge Plan

- Average daily balance Accrual type with the batch cut-off date specified
 - The process determines the total payment plan balance as of the batch cut off date provided in the parameter of the concurrent process which is the opening balance.
 - The process carries forward the opening balance and adds the next day's balance to a total daily balance. If an installment becomes due on a certain date, the process increases the balance by that installment amount. If a payment was received on a certain date, then installment amount is decreased. The daily balance is calculated until the system date.
 - The process then adds up each day's balance, and then divides the total by the number of days between the batch cut-off date and the system date to derive the average daily balance of the payment plan for that period.
 - The process applies the daily % rate to this average daily balance, then multiplies by the number of days for this period. (This same logic is used for existing for account balances).
- Average daily balance Accrual type with the batch due date specified

- The process determines the total payment plan balance as of the batch due date specified as concurrent process parameter. The total payment plan balance as of the batch due date is equivalent to the opening balance.
- The process carries forward the opening balance as daily as the next day's balance and adds this new day's balance to a total daily balance. If an installment becomes due on a certain date, the process increases the balance by that installment amount. If a payment was received on a certain date, then the installment amount is decreased. The daily balance is calculated until the system date.
- The process then adds up each day's balance, and then divides the total by the number of days between the batch cut-off date and the system date to derive the average daily balance of the payment plan for that period.
- The process applies the daily % rate to this average daily balance, then multiplies by the number of days for this period.

8.4.1.6 Running the Ad Hoc Group Waiver Concurrent Process

You can waive a charge at the fee type level, and at an individual transaction level for a given time period in the Charges History and Waiver Details windows and through the Ad Hoc Group Waiver concurrent process. Once the charges are waived, they are not used to calculate the fee and hold balances.

You can waive charges manually or by running the Ad Hoc Group Waiver concurrent process. This process applies or releases waivers on a large number of charges with similar attributes, such as fee type or holds balance. Waivers are also applied at the Party level or at Person ID group level.

When waivers are applied for specific balance type (fee or holds), those charges are excluded from the total balance calculation. When waivers are released, those charges are re-considered for balance calculation from the time the waivers are released. Retroactive waivers are not permitted.

Navigation

Student Finance > Account Summary > Charges History

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To waive a charge manually:

1. Query the appropriate record in the Charges History window.

- 2. Click **Waiver Details** and select the appropriate balance type. Specify the start and the end date for waivers.

To waive charges for a group of students:

- 3. Run the Ad Hoc Group Waiver concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 4. To set the parameters, reference the following table.

The following table describes the parameters for the Ad Hoc Group Waiver concurrent process.

Table 8–7 Ad Hoc Group Waiver Concurrent Process Parameters

Parameter	Description
Action	Specify if the concurrent process is to waive or release waivers. This is a mandatory parameter.
Balance Type	Select the balance type for which you need to waive the charges. This could be fee type or holds. This is a mandatory parameter.
Waiver Start Date	Start date from which the waiver is applicable. This is an optional parameter.
Waiver End Date	End date until which the waiver is applicable. This is an optional parameter.
Waiver Release Date	Date on which the waiver is to be released. This parameter is mandatory only if the Action parameter is specified as Waive. This field defaults to system date and can be changed.
Party Number	Party Number as defined in the Person Details window. This is an optional parameter.
Person ID Group	Displays list of all the person groups defined in the Oracle Student System. You cannot specify a closed Person ID Group. This is an optional parameter. Specify only Person Number or Person ID Group. Both the parameters cannot be specified at the same time.
Fee Period	Fee period during which all charges are considered for processing and reviewed for any of the particular fee types, if identified. This is a mandatory parameter.
Fee Type 1	You can select up to three Fee Types for which waivers are to be applied or released. Specify the first Fee type in this field. This is an optional parameter.

Table 8–7 (Cont.) Ad Hoc Group Waiver Concurrent Process Parameters

Parameter	Description
Fee Type 2	Specify the second Fee Type for which a waiver is to be applied or released. This is an optional parameter.
Fee Type 3	Specify the third Fee Type Fee for which a waiver is to be applied or released. This is an optional parameter.
Test Mode	Select the Yes mode to trial run the process. The changes are not updated when the concurrent process is run in the test mode.

8.4.1.7 Running the Discontinue Student Unit Attempts for Non Payment Concurrent Process

You can use the Process Discontinue Students for Non Payment concurrent process to discontinue a student from enrollment into units if the fee for the unit have not been paid at the point in time the job is run. This process calls the enrollment program API to discontinue the students from those specific units for which fees have not yet been paid.

Prerequisites

Student enrollment in units.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To discontinue students from units for non payment:

1. Run the Discontinue Student Unit Attempts for Non Payment concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Discontinue Student Unit Attempts for Non Payment concurrent process.

Table 8–8 Discontinue Student Unit Attempts for Non Payment Process Parameters

Parameter	Description
Person Number	Specify the person number of the person to be discontinued from the list of person number displayed. This is an optional parameter.
Person ID Group	Displays list of all the person groups defined in the Oracle Student System. Users cannot specify a closed Person ID Group. This is an optional parameter. Specify only Person Number or Person ID Group. Both the parameters cannot be specified at the same time.
Fee Period	Start and end dates for a fee period This is a mandatory parameter.
Balance Type	Balance type can be Fee, Holds, or Standard. If a balance type has been passed as a parameter, the process checks if any exclusion rules were defined for the particular invoice creation date from the Charges table.
Discontinuation Reason Code	Select the reason code for discontinuation. This is a mandatory parameter.
Test Run	If Yes, the test run produces a report of the students and units are discontinued. If No, the test run discontinues students from units that have not been paid.

8.4.1.8 Calculating Student Contract Fees

Your institution can agree to assess one or more fees for an individual student at a different charge rate. Such agreed contract rates apply only to particular program attempts and not to institution-wide fees.

If desired, a variety of conditions can further limit the circumstances in which a contract rate applies, such as location code, attendance type and attendance mode. These include the way in which the program is studied and the ability to revert to the normal rate if the student is disadvantaged under the contract.

Contracts can also be set for prospective students through the Admissions subsystem in the Establish Fee Contracts window, once the applicants have been pre-enrolled in a program. Such contract rates are automatically established for the normal program duration at the current rate during the proposed program commencement. They are displayed, and can be amended, in the Contract Fee Assessment Rates window.

If contracts are established through admissions, they can be subsequently end-dated automatically. This can be achieved by the Clean Up Unconfirmed Student Program Attempt Process concurrent process, if the applicant does not confirm enrollment in the relevant program.

Contract rates cannot be established for fees with a system fee trigger category of type, **Institutn**. The contract rate is considered if the effective date for running the fee assessment routine falls within the period specified for the contract.

If you want to set up rates for a fee type that is linked to an old fee category, the fee type has to be included in the new fee category.

Fee contracts are established by the following methods:

- For individual applicants, a fee contract is created within the Student Finance subsystem using the Contract Fee Assessment Rates window. A rate is established for each applicant.
- For an identified group of applicants, a fee contract is established automatically when the applicants are pre-enrolled through Admissions, using the Direct Admissions Program window when an offer is made or when the Batch Pre-enrollment Process concurrent process is run.
- Fee contracts are created on a person-by-person basis through the Admissions subsystem once pre-enrollment occurs, using the Establish Fee Contracts window, accessed through the Direct Admissions Program window.

Fee contract rates can also be created during the admission process. For more information on establishing fee contract rates, see [Maintaining Fee Details](#), Admissions.

Navigation

Student Finance > Contract Fee Assessment rates

Steps

To define contract fee assessment rates:

1. Query the appropriate record in the Contract Fee Assessment Rates window.
2. Enter the appropriate details in the Student Program Attempt and Student Region.
3. Select the Assess Fee checkbox if you want to assess the contract fees for the student.

4. Save your work.

8.4.2 Fee Assessment

The central process in the Student Finance subsystem for creating charge transactions is the Fee Assessment concurrent process. This concurrent process determines the fees applicable to individual students, calculates the relevant amounts, and stores this information as a debt which the student or the sponsor must pay.

The Fee Assessment process is run to calculate all student fees within a fee period. For students already enrolled with the university, fees are calculated based on previous assessments for each fee owed by a student.

The Fee Assessments concurrent process can also be run in batch or immediate mode by a fee administrator, as required. It can also be run in test mode without updating the database.

8.4.2.1 Fee Assessment Attributes

Fee assessment calculates student fees based on the following attributes:

- Fee Assessment Concurrent Process Parameters
- Fee Calculation Methods
 - Assess By Program
 - Assess By Career
 - Assess By Primary Career
- Student Program Attempts
- Load Calendars
- Process Fee Category Fee Liability
- Charge Elements
- Retention Schedule
- Rates
- Charge Method
- Student Enrollment Details

The *Oracle Student System User Guide* covers the Fee Assessment concurrent parameters in detail. For information on the remaining attributes of fee assessment, see the *Oracle Student System Implementation and Administration Guide*.

8.4.2.2 Running the Fee Assessment Concurrent Process

Fee assessment determines the fees applicable to individual students, calculates the relevant amounts, and stores this information as a debt the student or the sponsor must pay. If a student's enrollment changes, the system reassesses fees owed.

The fee assessment process operates according to one of the following methods:

- Running predictive assessment of program related fees for individual applicants processed through the Admissions subsystem. This assessment is initiated for individual applicants from a button in the Establish Fee Contracts window.
- Processing Student To Do entries that identify each student who has enrolled or changed enrollment since the last fee assessment. The Process Fee Assessments from Student To Do Entries concurrent process runs in batch mode, and should be used for the initial fee assessment run of a fee period, and be scheduled to run nightly.
- Running as required in either immediate mode or batch mode for one student, a group of students, or all eligible students, depending on the parameter selected. This method allows test runs without altering data in the database using the Fee Assessment concurrent process and predictive fee assessments for one or more applicants, as long as they have been pre-enrolled.

Note: Predictive fee assessments can be cleared if the applicant does not accept an offer to study in a program by running the Clean Up Unconfirmed Student Program Attempts concurrent process.

You can use the Charges History window to view the created charges. It can also be viewed by the student from the self-service window.

8.4.2.3 Entering Fee Assessment Parameters

The output of the Fee Assessment concurrent process largely depends on the parameters defined when running the concurrent process. The parameters required for the Fee Assessment Concurrent Process are listed below:

Runtime Comment - Using this parameter, you add comments before running the fee assessment process.

Fee Assessment Effective Date - If no effective date is provided, then the current system date is set at the process effective date. If the input date is same as the current system date, then there is no change in the process effective date. If the input date is a future date, then predictive assessment cannot be carried out.

While running the fee assessment process, if the effective date is not specified, then the fee assessment process will be executed based on current program attempts. However, if you define a past date as the effective date, then fee assessment process will be executed in the history mode. Fee assessment run in the history mode assesses the fees for students with program attempts using the past effective date specified.

Person Number - Using this parameter, you can invoke fee assessment process for a single student. Person Number and Person Group Id are mutually exclusive parameters.

Program - Using this parameter, you can run the fee assessment for a specific program. You can provide an input to this parameter only when 'Career Centric Model' is disabled in the system. Predictive fee assessment is not done for unconfirmed program attempt status.

Fee Assessment Period - The fee assessment period and the fee type period must be attached to a fee calendar instance. If not, the process exits.

Fee Category - The process identifies all effective Fee Calendar Category Instances as on the process effective date. The process effective date must be between start and end dates of the Fee Category Calendar instances (FCCI). The process will continue assessing fees for all identified Fee Category Calendar Instances. If no active FCCI is found, then a message is logged in the report.

Fee Type - For system fee types of Tuition, Other, and Tuition-Other with unconfirmed program status, the attendance type and location code will be used for processing. Predictive fee assessment is not done for an Institution level fee type if multiple student program attempts are liable for the same fee type.

First Time Assessment - If fee assessment is being done for the first time, then the process determines if a valid program attempt exists. If yes, then the process checks for an existing debit record. If no existing debit record exists, it means that no prior fee assessment was done for this student.

Trace On - The Process Fee Assessments concurrent process produces the Fee Trace report including details about the data used and decisions made during fee assessment or reassessment. The full version of this report is produced when the Trace On parameter is set to Yes and the Display Warnings Only parameter is set to

No. The full version produces at least one page for each student liability and must be run for individuals or small groups only.

Display Warnings Only - If you set the Display Warnings Only parameter to Yes, the Trace On details are not generated.

Test Run - Using this parameter, you can run the fee assessment process without creating any charges.

Processing Mode - Different processing modes are:

- *Actual* - Fee assessment happens only for actual registrations and enrollments.
- *Initial* - Fee assessment is done even before an actual student registration, using prior enrollment details.
- *Combined* - Actual fee assessment is carried out first. In case the student has no actual registrations, then the Initial mode is carried out on the basis of the sub-processing type specified in the initial processing mode parameter.

Initial Processing Mode - The INITIAL or COMBINED fee assessment modes can be further categorized into three different types of Initial sub-processing modes:

- INITPRIOR - Derives the enrollment details from the prior fee assessment period and uses the current fee assessment period rates to calculate student charge. If there is no prior enrollment for the student, then assessment is not performed.
- INITPRDFLT - Derives the enrollment details from the prior fee assessment period and uses the current fee assessment period rates to calculate student charge. If there is no prior enrollments for the student, then the initial default amount defined in fee type calendar instance (FTCI) for the current fee period is used as the default assessment amount.
- INITDFLT - No enrollment details are considered, the Initial default amount defined for a fee type calendar instance (FTCI) is used as a default flat amount for assessment for each fee type.

Prior Fee Calendar Instance - If the fee assessment process is invoked with Initial Prior (INITPRIOR) or Initial Prior with Default (INITPRDFLT) mode, then the prior fee period is mandatory.

Person Group - Using this parameter, you can run the fee assessment process for a group of students. Select the required person group displayed in the LOV if applicable. This is an optional parameter.

Career - Using this parameter, you can specify the fee calculation method to be used for fee assessment. Fee Calculation method once set up in the System options window cannot be modified. All processing is dependent on the Fee Calculation Method that is set up in the system. Possible values for the Fee Calculation method are Program, Career or Primary Career.

- If the Program fee calculation method is set in the System, then the fee assessment concurrent process totals the units per program and assesses the rates and attributes for each program.
- If the Career fee calculation method is set in the system then for different careers in which the student registers, fee calculation is based upon the rates and attributes for each career, derived from the Primary Program.
- If the Primary Career fee calculation method is set in the system, then only the key program is assessed.

Predictive fee assessment is only available in the Program-based fee calculation method.

GL Date - Specify the GL Date to be assigned to the transactions created as a result of this process. This field is set to the system date by default. This is a mandatory parameter.

Institutions within the US must set the profile for fee assessment in the derivative mode. This is done at the site level. When set to the derivative mode, fee assessment considers the attendance type of the programs selected by a student. Each program is attached an attendance type (full time, half time, or three quarter time). Each attendance type is further associated with a load calendar which has lower and upper level load limits attached to it. If the accumulated attendance type of the programs selected sums to full time, then fee assessment would calculate the charges for full time attendance.

Prerequisites

System Options are defined.

Fee types, fee categories, and fee category calendar instances are defined.

Fee calendar instance are defined.

Load calendar relationship and program attendance type are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To calculate the tuition charges for an individual student or a group:

- 1. Run the Process Fee Assessment - Landscape concurrent process.

Note: This concurrent process is not available if the Manage Accounts field in the System Options window is set to Null (blank). For information, see Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

In case the assessment process is run in either the Combined or Initial mode, a predictive assessment cannot be carried out. Also, if an initial assessment needs to be done, then the effective date must be equal to the system date. Further, to specify the fee category, an active fee calendar instance is identified and passed to the mandatory fee assessment period parameter. If no active fee calendar instance is in place, then an error message is displayed. This is true only when the fee assessment process is invoked from the Admissions subsystem.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, reference the following table.

The following table describes the parameters for the Process Fee Assessments - Landscape concurrent process.

Table 8–9 Process Fee Assessments - Landscape Concurrent Process Parameters	
Parameter	Description
Runtime Comment	Select this field to add any additional comment while running the process. This is an optional parameter.
Fee Assessment Effective Date	<p>Select the date based on which the fee assessment process is run in the History or the Current mode. For example, if the date is a past date, then fee assessment is done in the History mode. If the date is within the current fee assessment period, then its run in the Current mode. This is an optional parameter</p> <p>For predictive fee assessments only, the fee assessment effective date can be after the current date, but not after the program start date alias instance recorded for the admission period. By this arrangement, if applicants do not confirm enrollment in a program attempt, their predictive fee assessments can be removed.</p>
Person Number	Specify the person number for whom the fee assessment process is to be run. This is an optional parameter.

Table 8–9 (Cont.) Process Fee Assessments - Landscape Concurrent Process

Parameter	Description
Program	<p>Specify the name of the program for which fee assessment is to be done. This is an optional parameter.</p> <p>The Program parameter is only available when the Fee Calculation method is set as Assess by Program.</p>
Fee Assessment Period	Select the fee assessment period. This is a mandatory parameter.
Fee Category	Select the appropriate fee category from the list displayed in the LOV. This is an optional parameter.
Fee type	Select the required fee type from the list displayed in the LOV. This is an optional parameter.
First Time Assessment	Specify if the fee assessment process is run for the first time for a student. This is an optional parameter.
Trace On	Set this parameter to Yes to view log details. The parameter is defaulted to No. This is an optional parameter.
Display Warnings Only	Set this parameter to No to view only warnings. This is an optional parameter.
Test Run	If this parameter is set to Yes, no fee assessment charges will be created. This is an optional parameter.
Processing Mode	<p>Select the processing mode for fee assessment. The default processing mode is Actual. The other options are: Combined and Initial. This is a mandatory parameter.</p> <p>Predictive mode is available only if the Fee Calculation Method is set as Assess by Program.</p>
Initial Processing Mode	Select the initial processing mode. Initial modes can be Initial Default (INITDFLT), Initial Prior (INITPRIOR), Initial Prior with Default (INITPRDFLT). This is an optional parameter. These values are available only if the processing mode is set to Initial first.
Prior Fee Calendar Instance	<p>Specify any prior fee calendar instance, if applicable. This is an optional parameter.</p> <p>This parameter is available only for the Processing Mode of Initial and the Initial Processing Mode of Initial Prior and Initial Prior with Default.</p>
Person Group	Select the required person group displayed in the LOV if applicable. This is an optional parameter.

Table 8–9 (Cont.) Process Fee Assessments - Landscape Concurrent Process

Parameter	Description
Career	Users can invoke fee assessment for a specific career. Users can also provide an input to this parameter only when Career Centric Model is enabled in the system. This is an optional parameter.
GL Date	Specify the GL Date to be assigned to the transactions created as a result of this process. This field is set to the system date by default. This is a mandatory parameter.

8.4.2.4 Recalculating Student Fees

The Process Fee Assessments from To Do Entries concurrent process assesses fees due from students with Student To Do entries recorded, indicating whether they are enrolled or have changed their enrollment since the concurrent process last ran.

The Process Fee Assessments from To Do Entries concurrent process and the Process Fee Assessments concurrent process both run the fee assessment process. The Process Fee Assessments from To Do Entries concurrent process creates transactions reflecting initial assessments or adjustments to previous assessments for each fee, students in a Student To Do list, must pay.

Prerequisites

To Do fee assessment record exists.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To calculate the tuition charges on changed enrollment statuses:

1. Run the Process Fee Assessment From To Do concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, reference the following table.

The following table describes the parameters for the Process Fee Assessments - From To Do Entries concurrent process.

Table 8–10 Process Fee Assessment From To Do Entries Concurrent Process Parameters

Parameter	Description
Fee Assessment Period	Select the fee assessment period. This is a mandatory parameter.
GL Date	Specify the GL Date to be assigned to the transactions created as a result of this process. This field is set to the system date by default. This is a mandatory parameter.

8.4.2.5 Calculating Audit Fees

Fee administrators can define unit and unit sections as auditable during setup. Depending on your institution’s policy, students may not be charged anything for audited units or unit sections, may be charged regular tuition, or may be charged audit fee instead of regular tuition fees.

Audit fees are calculated using the fee assessment process. If audit fees are associated with unit triggers, then the audited student unit attempt is matched with trigger and audit fees are charged at the Fee Category Fee Liability (FCFL). For more information, see the *Oracle Student System Implementation and Administration Guide*.

If audit fees are not associated with any trigger, then the fee assessment process checks for at least one student unit attempt that is audited.

If a match is found, then the fee for that unit or unit section is calculated towards the student charge.

If an audit fee is not defined for a unit at the Fee Category Fee Liability level, then the process checks if any of the student unit attempt is auditable. If yes, the fee is calculated for that student unit attempt.

The fee assessment process also performs another level of validations at the FCFL and determines if the FCFL is of the system fee type Tuition/Other or Audit. If the FCFL is Tuition/Other, then the process checks if the profile Charge Tuition for Audited Student Unit attempt is set to Yes or No. If set to Yes, then the charge element calculation considers all student unit attempts for fee calculation, both audited and non-audited. If set to No, the charge element calculation only considers student unit attempt that are not audited.

If fee type is an Audit system fee type, then the fee assessment process calculates the charge elements based on only auditable student unit attempts.

If the assessed fee type is not an Audit system fee type, then the fee assessment system calculates the charge elements based on both non-auditable and auditable student unit attempts.

For more information, see the *Oracle Student System Implementation and Administration Guide*.

8.4.2.6 Calculating Special Fees

Your institution can charge a special fee in addition to regular tuition fees.

For example, a student can be charged a lab fee for Chem 101 unit section. This special fee is charged in addition to the regular tuition for the unit section.

Special fees are charged at the unit section level. Similarly, if a special fee is set at the unit section level, then any student enrolled in that unit section is charged the special fee.

Multiple special fees can be attached to a unit section. When the student is enrolled for any of these sections, the fee will be applied to the student's account.

Special Fees once set up at the unit section level cannot be changed if students have already enrolled in the unit section.

Special Fees are charged at a flat rate only. Special fee at the unit and unit section level is normally flat rate. Special fee does not use student attributes to define assessment rates. The same amount of special fee is applied to all students who enroll in the unit section.

When the student drops or discontinue a unit, then the special fees charged for that unit will be reversed. Before reversing the charge, if retention schedule is defined then an additional retention fees is charged to the student. For more information on Retention Schedules, see the *Oracle Student System Implementation and Administration Guide*.

Special Fee cannot be assessed in *Predictive* mode.

8.4.2.7 Running the Special Fee Concurrent Process

Using the Special Fee Concurrent Process, you can create the special fee charges for the student unit attempts, where a special fee is associated to the attempted unit section.

Prerequisites

Special Fees are defined in the Program Planning and Structure subsystem for the unit section.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To calculate special fees:

1. Run the Special Fees concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, reference the following table.

The following table describes the parameters for the Special Fees concurrent process.

Table 8–11 *Special Fees Concurrent Process Parameters*

Parameter	Description
Person Number	Specify the person number for whom the fee assessment process is to be run. This is an optional parameter.
Person Group	Specify the person group for which you want to calculate special fees.
Fee Assessment Period	Select the fee assessment period. This is an optional parameter.
Test Run	If this parameter is set to Yes, no special fee charges will be created. This is a mandatory parameter.
GL Date	Specify the GL Date to be assigned to the transactions created as a result of this process. This field is set to the system date by default. This is a mandatory parameter.

8.4.3 Calculating and Applying Credits

Credits refer to transactions that decrease a student's outstanding balance. Credit transactions include:

- Over-the-counter (OTC): payments made by students over the counter, such as cash, check, and credit card. Receipts are generated for all such payments.
- Self-service/Online: payments made by students using self-service.
- Financial Aid credits: credits received as financial aid.
- Sponsor payments: credits from sponsors.

- Lockbox: An account maintained by institution with banks. Students use this account to make payments towards their charges.
- Deposit payments: Payments made by the student as a token of commitment for joining a program. Deposits are realized as credits on the student account only when transferred to the student's account by the institution.
- Credits from External Systems: Credits from external systems, such as cashiering systems and auxiliary operations that are added to the student account using the Credits API.
- Negative Charge Adjustments: A negative charge partially reduces the outstanding balance of a student.

Students can make payments over the counter in the Student Finance office, at designated fee counters, or through the self-service page. For each of these payments, a receipt is created to record the transaction. Students can make payments in cash, check, or credit cards. After entering payment details, fee administrators can generate a receipt and print it out. A credit is created on the student account to record the transaction.

Credits received through financial aid are brought into the student account by running the Awards - Disbursement Transfer to Student Finance concurrent process. This process is run by fee administrators at the Student Finance office.

Lockbox is another important source of credit. A lockbox is an account maintained by institutions with banks that record payments made for tuition, fees and deposits. The lockbox functionality enables you to record payments using transmission data files sent periodically by the banks. For more information, see [Importing and Processing Lockbox Data](#).

Deposits are another source of credits. When a student pays a deposit and later enrolls in a program, the deposit amount is transferred to the student's account as credit. For more information, see [Processing Deposits](#).

Negative adjustments can arise when a student decides to drop a unit attempt from the enrollment list. Negative fee adjustments result in students being assessed a lower fee either for all charge elements, such as single flat rate charge, or a reduced fee across all charge lines in a charge per credit point, or per unit section.

Negative charge adjustments occur when the fee assessment or the ancillary charges concurrent processes are run. These processes invoke an internal process called the Negative Charge Adjustment Creation process.

For more information on charge elements, see the *Oracle Student System Implementation and Administration Guide*.

Credits API - The Credits API creates credit transactions and imports payments or credit information from an external legacy system. The Credits API is available for use by all subsystems in Student System, legacy applications, or third-party applications and can be accessed as standard PL/SQL programs. This API also updates the Holds Balance whenever a credit transaction is created for a person. Hence, it cannot be invoked simultaneously with the Holds Balance Conversion Process.

You can invoke the Credits API for each credit record transaction to be created and transferred to the Credits tables. The Credits API checks the validity of all parameters, resulting in a return status, which informs users of the results of the API operation. The Credits API is disabled if the Manage Account field in the System Options window is set to Null. If the Manage Account field is set to Others, the Credits API doesn't update the balances. Balances are updated only when the Manage Account field in the System Options form is set to Student Finance. For more information on the Credits API, see the *Oracle Student System Open Interfaces User Guide*.

Credits can be applied, unapplied, and reversed. To apply the credits to the charges, you must run the Mass Application concurrent process or use the Applications window for individual students. The Mass Application concurrent process is run at the end of a billing cycle after fee assessment is done. Credits are applied to charges based on an application hierarchy set up in the Application Hierarchies window. For information, refer to [Application of Credits to Charges](#).

In Student Finance, all credits are categorized into credit type, credit class, and credit instruments.

The credit type is a key concept and an attribute of a credit transaction. The credit type determines the credit transaction and provides debit and credit accounts for the credit transaction. It also determines whether a credit transaction is allowed for refund or not. Credit types are defined by the institution. These credit types can be assigned different credit classes which are used to identify groups of credit types for internal processes. For example, if you create a credit type SF-CT1-OU, you can attribute the enrollment deposit credit class to this credit type. This means that all enrollment deposits will be accounted under the credit type SF-CT1-OU. For more information on credit types, see Setting Up Credit Type, in the *Oracle Student System Implementation and Administration Guide*.

In Student Finance, credit class is pre-seeded data. Pre-seeded credit classes can include Installment Payments, Negative Charge Adjustment, Enrollment Deposit,

External Financial Aid, Internal Financial Aid, Online Payment, Other Deposit, Payment, and Sponsorship. Credits with the credit class Adjustments can be applied only to the charge that is the source of the negative adjustment. In other words, applications hierarchy does not apply to the credit types that have the credit class adjustments.

A credit instrument refers to the mode of payments, such as OTC payments, cash, check, and online payments.

After credits are applied to charges, they become applied credits. Applied credits can be *Unapplied* and *Reversed*. Credit reversals might occur if checks deposited by the student are not accepted by the bank due to insufficient funds or if the student decides to discontinue the program. Similarly, applied credits can be unapplied to correct an error after the payment is made.

Actual and Planned Credits: Planned Credits are future financial aid or anticipated sponsorship disbursement money that are used by certain processes in Student Finance such as Billing, Holds, and Late Fee and Finance Charges.

The Financial Aid office calculates the amount of Financial Aid which the student is eligible for, and classifies these credits as Planned or Actual Credits. Actual credits get credited to the Student Account immediately. Whereas, planned credits are for informational purposes only and do not affect the student account balance.

Listed below is a description of credit categories:

- **Credit Class:** This category consists of four different credit classes: Installment Payments, Online Payment, Enrollment deposit, and Other deposit.
 - Payments refer to all credits a student incurs on successful admission to the university made through self-service pages or lockbox. Such payments are associated with the *Payments* credit class.
 - Payments toward installment plans are associated with the *Installment Payments* credit class.
 - Payments toward Other deposits made for ancillary facilities, such as housing, meals, and parking, are associated with the **Other** deposit credit class.
 - Payments toward enrollment deposits are associated with the *Enrollment* credit class.
- **Credit Instrument:** A credit instrument refers to various modes of payments, such as cash, credit card, and check. Checks may include bank's checks, cashier's checks, money order, and traveler's checks.

- Credit Card type: Students may use various types of credit cards to make Over the Counter (OTC) payments. This information can be recorded in Student Finance using the Receipts window. The credit card type includes American Express, Visa Card, Master Card, Diners Club, Discover Card and others.

Note that credit card information entered using the Receipt window is for informational purposes only and is processed through an external credit card system prior to creation of the receipt transaction.

8.4.4 Generating and Printing Receipts

For every payment recorded using the Receipts window and the self-service page, a receipt can be generated. You can also print the receipt and view details of transaction activities.

Prerequisites

Credit type are defined.

Navigation

Student Finance > Receipts

Additional Notes

- To generate a receipt for any payments made using the Receipts Window, click **Print Receipt**.
- To view credit details, click **Credits History** in the Account Summary window. This displays the Credit Activities Detail window.

8.4.5 Importing and Processing Lockbox Data

A lockbox is a facility offered by banks to institutions through which the institution receives payments by mail to a post office box. The banks pick up the payments at regular intervals, (several times a day), deposit them into the institution's account, and notify the institution of the deposit by sending the payment details in a flat file format. Such accounts are called Lockbox accounts.

Students make payments toward their charges or make designated payments, deposits, and installment payments using these lockbox accounts. An institution may have multiple lockbox accounts with the same bank or a single account. Institutions can also have different lockbox accounts with different banks.

In certain cases, institutions might instruct their students to make payments for multiple charges in a single check. For example, the institution might ask students to pay the tuition and library charges in a single check. Such payments are called consolidated payments. You can record consolidated payments using the lockbox functionality in Student Finance. For information on how to set up multiple lockboxes and consolidated payments, see *Setting Up Lockbox* in the *Oracle Student System Implementation and Administration Guide*.

After calculating the charges and credits of a student, the institution sends a bill to the student and sponsor instructing them to send payments to a bank lockbox account along with the remittance slip. The remittance slip provides information to banks about the payment made by the student or the sponsor, such as the party number and amount. Next, the student sends payments to the appropriate lockbox per the institution's bill payment instructions, with the correct party number and payment identification information attached. The bank records all the payment and remittance details and sends the data to the institution in a flat-file format.

The Lockbox functionality is a combination of concurrent processes run one after the other, enabling institutions to import, parse, validate, and record details of student payments from bank-generated data files. The lockbox functionality consists of three concurrent processes:

- SQL Loader
- Import Lockbox
- Lockbox Import Error Resolution

The Lockbox functionality also enables students to select charges for *designated payments*. Designated payments can only be made for those charges for which the fee types are marked as *designated* in the Fee Type window.

In case of designated payments, the credits (lockbox payments) are applied to charges identified for payment by the student through self-service pages. The pre-defined application hierarchy is ignored in such cases.

In some cases, the bank may report designated payments in excess of the allowed charge numbers. In such cases, receipt overflow records are created. Fee administrators can view the details of such receipts in the Lockbox Receipts Overflow Details window.

For the Import Lockbox process to run successfully, fee administrators must set up the lockbox functionality for each lockbox associated with a bank. For more information on *Setting Up Lockbox*, see the *Oracle Student System Implementation and Administration Guide*.

After the required setup is performed, fee administrators can easily import all bank data associated with multiple lockboxes or single lockbox and record them in student accounts. To do so, fee administrators must run the SQL loader process and then run the Import Lockbox process to validate and update the bank data (records) into Student Finance.

8.4.5.1 Running the SQL Loader Process

Institution receives bank lockbox data in flat-file formats. This format is not recognized by Lockbox interface tables used for transferring bank data to Student Finance. Therefore, to convert the contents of the flat-file format into meaningful data, you must register a user-defined concurrent program called the SQL Loader process.

Each SQL Loader concurrent program must be associated with a control template file that determines the positional mapping between the bank data file to the Lockbox interface table. This control file template is defined during setup. For information on the control file template, see *Setting Up Lockbox* in the *Oracle Student System Implementation and Administration Guide* and the *Oracle Student System Open Interfaces User Guide*.

Prerequisites

A control file is defined to map the data in the bank transmission file to columns in the lockbox interface table. The lockbox loader concurrent process is controlled by this file.

Credit Type Mapping are mapped to bank codes in the Lockboxes window. Credit Type mapping is required only if no default Credit Type is set up.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To import data from the bank data transmission file to the interface table:

1. Run the SQL Loader concurrent process. To run this process, a control file must be defined in setup.

For registering a SQL Load program, see the *Applications Open Library Foundation Guide*.

2. Define an executable with the executable method as SQL Loader, and then define a concurrent process for that executable. The SQL Loader Programs must have a control file name specified as the executable.

Note: Sample control file templates are shipped as part of this patch. These sample files would help you define control files templates to be associated with the SQL loader processes according to the different bank supplied lockbox data file formats. Control files can have any name, but the extension must be **.ctl**.

3. You must specify the path where the bank data is stored while running the SQL Loader program. The SQL Loader program reads through the bank-generated transmission file and positions the bank data into the Lockbox interface table as specified in the control template file.
4. After running the SQL Loader program, you must run the Import Lockbox process to validate and import the raw data from the Lockbox Interface table to the credits table in Student Finance.

8.4.5.2 Running the Import Lockbox Process

Once the lockbox data is successfully loaded into the Lockbox Interface table, you must run the Import Lockbox Process to apply the payments received from the banks to student and create receipts for each record.

Before applying the payments to the charges, the Import Lockbox Process validates the data in the Lockbox interface table using two types of validation: Type I and Type II validation.

If Type I validation is successful, the data is written back to the interface table and then type II validation is done on the data. If the process finds some errors during these validations, it places the data in the Error table.

The Import Lockbox Process also supports installment plan payments. You must map a bank code to the credit type with Installment Payments as the credit class to process installment payments.

Fee administrators must fix errors using the Lockbox Import Error Resolution window and invoke the Lockbox Import Error Resolution Process. This process validates the corrected records and posts the records to the student account. For information, see [Running the Lockbox Import Error Resolution Process](#).

If an installment payment via lockbox exceeds the total payment plan balance due, the import process splits the installment payment into two receipts when calling the Credits API. One receipt is made towards the total payment plan balance due, while the second receipt is created with the default credit type during Lockbox setup. If

no default credit type exists, then the record is posted to the Error Resolution table for normal processing.

Type I Validation: Type I validations are performed to check if the columns within the bank transmission file contain the correct data as required depending on the record type of each row in the data file. For example, if the record type is Lockbox header, then under the Lockbox column, the corresponding data must exist or the entire transaction file is rejected. At this stage, the concurrent process terminates and writes to a log file all the errors it encounters and then exits the process. If no Type I errors are found, the process continues with Type II validations.

Type I validations are performed at the following levels:

- **Transmission Level Validation:** At this level, the process checks if transmission record count and the transmission amount (sum of all receipts in the entire transmission file) is correct, if provided.
- **Lockbox Level Validation:** Type I validations check lockbox records to ensure that lockbox information corresponds to your transmission format. In this context, the Lockbox batch count, amount, and record count are validated for, if they are provided.
- **Batch Level Validation:** At this level, the Import Lockbox Process validates your batch records to ensure that batch information corresponds to your transmission format. The process validates if the batch name is unique within the lockbox if provided, if the batch amount is correct, and if the batch record count is correct if provided.
- **Receipt Level Validation:** At this level, the Import Lockbox Process validates the receipt Record Types rows to ensure that receipt information corresponds to your transmission format. In this context, the process validates if the receipt amount is specified and if the sum of the amounts of the Designated Payments specified in the Overflow region of the Receipt record does not exceed the total receipt amount.
- **Overflow Level Validation:** At this level, the Import Lockbox Process validates the overflow records to ensure that overflow information are correct in relation to the other records in the transmission. In this context, the process validates if the batch name, lockbox number, item number with a matching receipt record is specified. The process also checks, if the sum of all of the overflow records for that receipt is within the total receipt amount.
- **Negative Amount:** The process also validates that there are no negative amounts or any negative designated payment application amounts. If the

validation encounters any negative figures, the file is rejected and an error message is displayed.

Type II Validation: At Type II validation level, Student Finance specific validations are performed. The Import Lockbox Process checks for the following:

- Valid lockbox number
- Valid GL date
- Valid party number
- Credits type code
- Payment Plan
- Default credit type for lockbox
- Credit class
- Fee calendar type
- Valid charge number

If the concurrent process encounters any errors at Type II level, the erroneous records are stored in the Errors table. Fee administrators must use the Lockbox Import Error Resolution window to rectify these errors and then run the Lockbox Import Error Resolution Process which loads the records to the Credits table.

The Import Lockbox process also invokes the application process for designated payments. Designated payments are payments made towards specific charges on a student's account. The Lockbox process supports designated payments only if the records in the bank transmission file contain a charge number that can be matched in the Student's Account. Fee administrators need to specify if designated payment is to be allowed for a fee type in the Fee Type window during setup.

The application process if invoked, first validates if the charge number provided in the remittance slip belongs to a fee types that permits targeted application. If it does, then the receipt will be applied directly against that charge, bypassing the application hierarchy.

Records that pass Type II validations are successfully inserted into the Credits table using the Credits API and are purged from the error table. Records that fail Type II validations continue to remain in the Error table pending error resolution. You need to fix such records using the Lockbox Import Error Resolution window and then execute the Lockbox Import Resolution process to upload the files to the Credits table.

Prerequisites

Credit Type Mapping are mapped to bank codes.

Credit Type mapping is required only if no default Credit Type is set up.

Fee Calendar Instance are mapped to bank codes in the Lockboxes window. This setup is optional and required if the bank file is passing term information with the receipts.

Bank account name, account code, and branch information mapped to bank codes.

Identifier (bank-determined Record ID value), record type, and description are defined.

Navigation

Student Finance > Receipts

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To import and validate bank data into Student Finance:

- 1. Run the Import Lockbox Process concurrent process. This concurrent process takes the parsed data that is residing in the interface table, performs the necessary validations, and writes successful records to the student account.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, reference the following table.

The following table describes the parameters for the Import Lockbox Process concurrent process.

Table 8–12 Import Lockbox Process Parameters

Parameter	Description
Lockbox Number	Select the lockbox number from the list of active lockboxes defined in the system. This parameter will be used as a selection criteria to find all records in the interface with this matching Lockbox Number with a status of TODO. This is a mandatory parameter.

Table 8–12 (Cont.) Lockbox Import Concurrent Process Parameters

Parameter	Description
GL Date	You must supply a valid GL Date if the Lockbox selected above has been set up with the GL Date Source option set to “User Supplied” in the System Options window. This is an optional parameter.
Test Mode	<p>Select the Yes mode to trial run the process. The changes are not updated when the concurrent process is run in the test mode. If you select yes, all validations report, both successful and failed records are written to the log file but are not inserted records into the Credits table.</p> <p>If No, the process inserts all the successful and failed records into the Credits table and makes appropriate entries into the log file. This is a mandatory parameter.</p>

To verify if the lockbox import was successful, query the appropriate student number in the Account Summary window and select **Credits History**.

8.4.5.3 Running the Lockbox Import Error Resolution Process

If the Import Lockbox Process encounters any errors when validating and importing lockbox data, such records are temporarily stored in the Errors table in Student Finance.

Errors can occur if the data fails any of the Type II validations. For information on Type II validations, see [Running the Import Lockbox Process](#).

You must fix these errors using the Lockbox Error Resolution window and invoke the Import Error Resolution Process. This concurrent process validates the corrected records and posts the records to the student account.

The Lockbox Import Error Resolution Process is identical to the Import Lockbox Process, with the same concurrent process parameters. However, this concurrent process differs from the Import Lockbox Process in two ways.

- First, the data to be imported is not drawn from the Interface table, but from the Error table.
- Second, the process leaves out the Type I validations entirely, and performs only the second part of the Import Lockbox Process - performing type II validations and the calling of the Credits API to create credits in the Credit table.

As with the Import Lockbox process, every record successfully inserted into the Credits table will be deleted from the Error table. Any records that fails any Type II validations will remain in the Error table for further correction.

The Lockbox Import Error Resolution Process will collect all the available data in the Error table, just like the Import Lockbox Process.

Prerequisites

Errors are logged in the Lockbox Error table.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To transfer corrected data from the Errors table to the student account:

- 1. Run the Lockbox Import Error Resolution Process.

Note: Item numbers are used to link a receipt to the receipt overflow details records. The item number tag associates an overflow record with the parent receipt record. Each lockbox and batch has a unique item.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, reference the following table.

The following table describes the parameters for the Lockbox Import Error Resolution Process.

Table 8–13 Lockbox Import Error Resolution Process Parameters

Parameter	Description
Lockbox Name	Select the lockbox name from the list of active lockboxes defined in the system. This parameter will be used as a selection criteria to find all records in the interface with this matching Lockbox Number with a status of TODO . This is a mandatory parameter.
GL Date	You must supply a valid GL Date if the Lockbox selected above has been set up with the GL Date Source option set to ‘User Supplied’ in the System Options window. This is an optional parameter.

Table 8–13 (Cont.) Lockbox Import Error Resolution Process Parameters

Parameter	Description
Test Mode	<p>Select the Yes mode to trial run the process. The changes are not updated when the concurrent process is run in the test mode. If you select yes, all validations report, both successful and failed records are written to the log file but are not inserted records into the Credits table.</p> <p>If No, the process inserts all the successful and failed records into the Credits table and makes appropriate entries into the log file. This is a mandatory parameter.</p>

Note: Since error records in the Error table can come from multiple batches under multiple Lockbox accounts, the Lockbox Import Error Resolution window can be queried to select the records to fix. Changes can be made directly to the interface table through the Lockbox Import Error Resolution window. Also, the total charges specified for designated payments must not exceed the total receipt amount (the total amount paid through the lockbox).

3. In the Lockbox Import Error Resolution window, enter the credit type bank code, fee calendar bank code, GL date, and admission application number. All this information comes with the bank data transaction file.
4. Enter the charge number for which a designated payment is made and then enter the total amount of the receipt in the Amount field.
5. To view and fix erroneous data for a single receipt header row, click **Receipt Overflow Details** in the Receipt Overflow Details window. This displays the Lockbox Receipt Overflow Details window which contains the charge number and amount for each overflow receipt. Data displayed in this window is always in the context of a single receipt header row in the bank transaction file. The Receipt Overflow Receipt window displays errors relevant to type II validations only.
6. Fee administrators will not be able to correct the party number, GL date, credit type code, or any other receipt attributes in the Receipts Overflow Details window because this information is derived from the receipt header level record.
7. The sum of the currency amount for all records plus the designated charge amount columns for a receipt in the parent window must not exceed the receipt total shown in the parent receipt record.

8. After the errors are corrected, run the Lockbox Import Error Resolution Process to perform Type II validations on the failed records and to import successful records to Student Finance.

8.4.6 Processing Credit Card Fund Transfers

Institutions can use the services of Bank End Payment systems (BEP) to manage credit card transactions. A credit card Bank End Payment (BEP) system is a financial institution that handles all the electronic processing and fund transfer of an institution's credit card transactions. BEPs offers institutions a number of credit card management features, such as authorization, capture, submission, and fund transfer. Some examples of these BEPs are ABN Amro, Citibank, Paymentech, First Data, Verisign, Concord, and Cybercash. Institutions can process credit card fund transfers using Oracle Student System.

The credit card fund transfer process begins when a student makes an online payment using a credit card. Oracle Student System updates the credit account of the student and calls Oracle's iPayment to validate the authenticity of the card. iPayment validates the card and, if valid, updates the transaction data to the issuing bank or reverses the credit update if the validation fails. The issuing bank here represents the bank that issued the card to the student. Next, iPayment invokes its capture API to transfer the amount from the issuing bank to the merchant bank, such as Visa or Mastercard, where the institution has an account. Before transferring the money to the merchant bank, the iPayment API performs certain validations. If the validations are successful, the credits are committed to the student account or the amount is simply recorded in the system without any change to the student account.

For more information on iPayment APIs, see the *Oracle iPayment's Implementation Guide*.

The credit card fund transfer process is divided into two phases: authorization and settlement. The authorization phase consists of the authorization process where the credit card is validated, and an amount is reserved to cover the anticipated charge.

The settlement phase consists of the capture process and the close batch concurrent process. The capture process validates if the funds are ready to be transferred. However, the capture process by itself does not initiate the funds transfer from the card issuer bank to the merchant bank. To do this, the batch close process is invoked which submits all captured transactions to the merchant bank's clearing agent for final processing of the credit card transactions.

8.4.6.1 Updating Credit Card Payment Status

You can run the Update Credit Card Payment Status concurrent process to determine transaction status of all credit card transactions being processed in iPayment. If the transaction status is successful, the credit status is updated as a success and can be viewed in the Credit Card status field in the Receipts window. If the transaction is a failure, fee administrators need to manually reverse the receipt in the Receipts window.

The Receipts window displays the Credit Card field and the Receipt Status field. The credit card field can display the pending, success, or failure statuses depending on the outcome of the ipayment validation.

Whereas, the Receipt Status window displays either the **Cleared** or the **Reversed** status. The status of the credit card field is displayed as Pending when a new credit cards process is initiated. The Pending status indicates that the credit card receipt has been captured and is now pending completion of the credit card fund transfer process.

The **Success** status is the final positive status of the receipt once the concurrent process has confirmed via a query to iPayment that the settlement for the receipt has completed successfully.

The Failure status is displayed if the status inquiry indicates that the credit card receipt was not successful. In case of failures, fee administrators need to manually change the Receipt status field from **Cleared** to **Reversed**.

Most credit card fee processing is initiated when a student makes an online payment. However, fee administrators can also enter credit card receipts information using the back office windows. Users must ensure that all receipts are recorded through the back office Receipt window and authorized through an external credit card terminal because Oracle Student System back office window doesn't automatically initiate authorization and fund transfer. When a credit card transaction is entered in the Receipts window, the default credit card status is **Success**.

For information on iPayment, see *Oracle iPayment: Concepts and Procedures, Release 11i documentation, Part No. A86141.-02* from Oracle Metalink.

Prerequisites

Student Finance fee administrators need to schedule iPayment's Batch close process.

Navigation

Student Finance > Receipts > Receipts window

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To query the final status of the credit card transactions:

1. Run the Update Credit Card Payment Status concurrent process. You can view the log file to check the credit card receipts that failed the transaction process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

This concurrent process has no parameters.

2. To update the status of failed credit card receipts to Reversal, in the Receipts window, reverse the receipt in the Receipt Status field.
3. Save your work.

Guidelines

Institutions need to determine if they are a Host or Terminal based credit card merchant. This is determined by their contractual agreement with the institution's BEP. Institutions also need to determine whether their daily batches are closed automatically by their credit card processor, or if they are required to schedule a nightly Close Batch process using the iPayment Scheduler utility.

If the institution is operating in a Host mode, then they are not required to Close Batch nightly. For institutions in the Host mode, the credit card processor stores all captured transactions in servers and the batches are closed automatically for these transactions at a nightly basis.

If the Institution is operating in Terminal mode, then they are required to schedule the Batch Close process nightly using iPayment Scheduler. By scheduling the nightly Batch Close process, the institution ensures that all captured credit card transactions are submitted to their credit card gateway to initiate the funds transfer process.

8.4.7 Application of Credits to Charges

After credits are created, you apply them to charges using the Application process. The Application process is a program that determines open charges and applies the

available credits to the charges based on a pre-defined application hierarchy. You can define application hierarchies during setup.

If a student has multiple charges for the same fee type, the Application process applies the credits to the oldest charge first and latest charge at the end. For each credit applied to a charge, an application record is created in Student Finance. The Application process does not update the balance amount. Balance amounts are updated whenever a charge or credit amount is recorded in Student Finance.

For example, a student comes to the Student Accounts office and makes a payment of \$500 toward the outstanding balance on the student account. The payment is entered through the Receipts window and submitted to the *Credits API*. Upon validation, the entire payment is recorded in the student's account as credits. The existing charge of the student is \$1000. You access the Receipts window, query the appropriate student number with credit class of payment, access the Receipts Actions window and select the Apply/Unapply window.

This invokes the Application process which verifies the credit application hierarchy and applies the credits to the fee types per the application hierarchy. You can choose to override the existing application hierarchy by selecting a specific charge for credit application. After applying the credits, the process will associate the appropriate GL code combinations to the transaction and store the information in the Applications table.

Before applying a charge to a credit, the application process performs a set of validations to prevent under or over application of credits. These validations include:

- A credit is run through the entire applications hierarchy, until the credit is fully applied or there is no open charge left for a credit to be applied.
- Unapplied balance on a credit is not refunded by default. To refund such credits, you need to mark the credit type associated with the credit as refundable during setup.
- Each charge is validated to ensure that the credit amount applied to the charge does not exceed the total charge amount.

For maintaining accounts in GL, the Application process also creates accounting entries for each instance of a credit applied to a charge. When a credit is applied to a charge, a debit entry is created to the same GL account. This debit entry is the debit GL code combination of the credit. Similarly, a credit entry is created to the same GL account. This credit entry is the debit GL code combination of the charge.

Before applying a Title IV fund credit to a student's charge, the Application process determines if the student is eligible for Title IV fund depending on the Fund

Authorization level specified by the individual student. If the Fund Authorization level is set to Yes, the application order of Title IV credit is as follows:

- Allowable charges, current term
- Additional authorized charges, current term
- Allowable charges, prior term, based on the application hierarchy but applied to oldest charges first within each fee type.
- Additional authorized charges, prior term, based on the application hierarchy but applied to oldest charges first within each fee type.
- In case of excess Title IV credits, the credit amount is left unapplied in the student's account.

If the student is not eligible for fund authorization, the Application process applies the Title IV credits only to the charges within the current term.

The Application process handles Title IV fund credits differently than normal credits. The application of Title IV fund credits depends on the following fund authorization profile settings.

- **Funds Authorization Profile = N or Title IV = N:** If the Funds Authorization Profile is set to No or there are no Title IV Credit Types identified, the application process will access the Hierarchy Rules (fee types) set up under the Allowable tab of the Application Hierarchy. For each of the fee types listed in the hierarchy, the due charges are obtained without considering the fee period. The charges to be paid are listed by charge creation date in ascending order. In other words, application occurs by Allowable Fee Types and within each Fee Type by prior and then current fee periods.
- **Funds Authorization Profile = Y, Title IV = Y, and Funds Authorization Check box = Y:** If the Funds Authorization Profile = Y, Title IV is checked denoting signature of the funds authorization, and the Funds Authorization for the student is checked denoting signature of the funds authorization, then the appropriate applications hierarchy is accessed and the fee types defined in the Allowable tab in the Hierarchy setup are obtained.

For each of the fee types selected per the hierarchy order, the due charge records for the fee period in context are obtained. Once this is accomplished then the Fee Types defined under the Additional Authorized tab in the Application Hierarchy setup and the due charges records for the fee period in the context credit record are obtained.

Unapplied amounts are applied to the fee types defined in the Allowable tab of the hierarchy setup that are not in the Fee Period of the credit record and

then the Additional Authorized fee types are obtained. Due amounts are ordered by charge creation date in ascending order within a Fee Type.

- **Funds Authorization Profile = Y, Title IV = Y and Funds Authorization Check box = N:** If the Funds Authorization profile is set to Y and Title IV Credit is checked denoting Title IV funds, and the Funds Authorization was not signed by the student, then only the fee types defined in the Allowable tab for the current fee period are selected and the due charge records are obtained.

8.4.7.1 Applying Credits to Charges

Credits can be applied to charges either manually or by running the Mass Application Process. You can also unapply and reverse a credit applied to charge manually. There is no concurrent process to unapply or reverse charges.

Prerequisites

Charges are defined and Credit payments exist.

Navigation

Student Finance > Receipts

Steps:

To apply credits to charges manually:

1. Query the appropriate record in the Receipts window and then select the credit you want to apply.
2. Click **Create Receipts** and then click **Actions...1** to display the Actions window.

The **Action** button in this window is disabled if the Manage Accounts field in the System Option window is set to Other.

3. Click **Apply/Unapply** and then click **OK** in the Receipt Actions window to apply the current receipt to a charge. Enter the amount for charge and fee type in the Applications window.

Apply Using Hierarchy is activated only if Account hierarchies are assigned at the fee type calendar instance level. For each possible fee type calendar instance, you can assign a uniquely defined hierarchy.

4. Click **Confirm** in the Receipts window to save and check that the total amount applied for all charges does not exceed the original unapplied amount of the credit transaction.

Note: You also need to click **Confirm** when you unapply a charge.

5. Click **Auto Apply** to copy the balance due in the Amount Applied field until the unapplied amount is zero.

Note: Select the Apply check box when the amount applied is the greater of balance due and unapplied amount.

6. Click **Print Receipt Online** to print the receipt.

8.4.7.2 Running the Mass Application Process

The Mass Application process selects eligible credits and applies them to open charge items per the application hierarchy. This process is repeated until the unapplied amount of the credit is fully applied or all open charge items that the credit transaction belongs to are closed. The mass application process is applicable to both Cash and Accrual accounting methods. For more information on Cash and Accrual accounting methods, see the *Oracle Student System User Guide*, Student Finance chapter, Creating and Calculating Charges.

The mass application process starts with identifying the credit transactions from the Credits table that matches the concurrent process parameters specified by the user. The concurrent process then validates if the credit transactions have positive and unapplied amounts. If yes, the process selects all the credit transactions between the given Credit Date Low and High parameters and matches them against the effective date of the credit transactions. Credit Date Low and High Date parameters refer to the dates between which the credit transactions are to be considered.

Once the credit transactions to be processed are identified, they are sorted based on the effective dates for application to charges. If no Person or Person ID Group is provided as parameter, then the mass application process is run for all credit transactions that meet the positive unapplied amount and user-specified parameter criteria.

Next, each credit transaction is taken one at a time from the credits table and applied to charges based on the application hierarchy defined in the Application Hierarchy window. The effective date for the credit transaction should be between the hierarchy effective start date and effective end date.

After the application hierarchy is identified for a credit transaction, the concurrent process derives all the active fee types from the Rules table and checks if the fee types have any balance due amount. In case there are more than one fee types with balance due amounts, these fee types are picked up per the order of fee type sequence defined in the rules sequence table. The rules sequence table assigns higher precedence to fee types with a lesser number.

Once all the fee types with open charges are identified, credits are applied to each fee type. The credits are applied first to the oldest invoice in a descending order - the oldest invoice transaction first. Once fully applied, the balance due amount is made zero and the next transaction is chosen for application. This process continues until the credit unapplied amount is fully consumed or no positive balance due charge transaction is available for application.

Prerequisites

Charges are defined and credit payments exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps:

To apply credits to charges for a group of student:

1. Run the Mass Application Process concurrent process to apply the credits to the charges.

Note: This concurrent process is not available if the Manage Accounts field in the System Options window is set to Null (blank) or Other. For information, see Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Mass Application Process concurrent process.

Table 8–14 Mass Application Process Concurrent Process Parameters

Parameter	Description
Party Number	Select the Party Number as defined in the Person Details window. This is an optional parameter.
Person Group ID	Select the person ID group from the list of all the person groups defined in the Oracle Student System. You cannot specify a closed Person ID Group. This is an optional parameter. Specify either Person Number or Person ID Group. Both the parameters cannot be specified at the same time.

Table 8–14 (Cont.) Mass Application Process Concurrent Process Parameters

Parameter	Description
Credit Number	Select the credit number if you have required information. This is an optional parameter.
Credit Type	Specify the credit type. This is an optional parameter.
Credit Date Low	Specify the start date from which credit transactions are to be considered.
Credit Date High	Specify the end date until which credit transactions are to be considered.
GL Date	The system picks up the system date as the default GL date. Users can change this date. This is a mandatory parameter.

Additional Notes

- To reverse an applied credit amount, click **Reverse** in the Receipt Actions window.
- Enter the credit number, the credit amount to be reversed, the reversal date, and the reason for reversal in the Credit Reversal window. You can only reverse an unapplied credit.

8.4.7.3 Unapplying Credits

If a credit amount is applied in error to a charge which is different than the intended charges, you can unapply that transaction in the Applications window. When you unapply a credit, a negative charge of the same amount will be entered in the Applications table. You can view this negative charge adjustment in the Account Summary window.

Navigation

Student Finance > Receipts

Additional Notes

To unapply a credit amount:

- Select the appropriate credit you want to unapply and click **Actions...1**. This opens the Applications window.
- Select the Apply/Unapply check box and click **OK**.

- You can view the changes in the Account Summary by clicking Account History.

8.5 Generating Bill Extracts

To update students and sponsors on the financial transactions, a bill extract is generated by institutions that provides the information required to produce an invoice or bill using a customer created process. This bill extract includes details, such as the opening and closing balance amount, due date, batch cut off date, planned and actual credits, deposits, and payment plan installment payments.

Using the bill extract process in Student Finance, you can generate billing information for each student. The billing extract contains details of planned credits and deposits. You can generate bills both for students and sponsor party. The output of the billing extract is same in both the cases.

To generate a bill extract, a remittance address and at least one mailing address are required. The remittance address is the institution's physical address defined during setup. The mailing address is the home or any other address specified by the student.

A student can have up to three mailing addresses. The billing extract considers the first address as the main billing address. For more information on how to set up mailing addresses, see the *Oracle Student System User Guide*.

You can view the billing history of a student in the Billing History window. Billing details related to actual and planned credits, deposits, payment plan installments, and credit reversals can be viewed in this window.

8.5.1 Running the Bill Extract Process

To generate billing information, you run the Billing Extract concurrent process. This concurrent process extracts charges, credits, balance information, planned credits, billing addresses, due date, and a remit to address, deposits, and payment plan installment details for creating a student bill.

The Billing extract process starts with identifying the person to be billed, the billing start date, and the transactions to be included in the bill. Next, the bill to address, bill number and the closing balance is determined and the Bill Extract table is updated. In the Billing Extract table all charge transactions are recorded as positive transactions and the credit Transactions are recorded as negative transactions. Once a credit and charge transactions are extracted, a bill date, bill number and due date

is stored against the transaction. A credit and charge transaction can only be extracted once.

Apart from processing general billing details, such as effective dates, closing and opening balance, and the total payable amount, the billing extract process also includes details on the following:

Planned Credits - Planned credits are money from financial aid or sponsorships. You can choose to include or exclude planned credits in the billing process based on System Options and Sponsorship setups. For more information, refer to [Administering Student Sponsorships](#).

The Billing Extract concurrent process checks if the Include Planned Credits option is set in the System Options window. If yes, then the planned credits are included for billing purposes along with the actual credits while determining the closing balance of the student as part of the billing extract.

Deposits - The Billing Extract concurrent process includes deposit details in the bills. However, deposits do not reduce the outstanding balance on the bill. To include deposit details, the Billing Extract Process picks up deposits with **Cleared** status from the Credits table and inserts them into another table called Deposits Billing Extract table. When a bill is generated, the deposit information is extracted from the Deposits Billing Extract table and displayed in the bill. All deposits with receipt date less than or equal to the cut off date is included in the bill.

Deposit information included in the bill with actual credits:

- Bill ID
- Credit ID (for the Deposit)
- Credit Activity ID (for the Cleared activity of the Deposit)

Deposit information included in the bill:

- **Date:** Receipt Date of the Deposit
- **Number:** Receipt Number of the Deposit
- **Credit Class:** Credit Class of either Enrollment or Other deposit
- **Credit Type:** Credit Type of the Deposit Amount

Payment Plan Installments - The Billing Extract process includes student payment plan details for all student with active payment plans in the bills. **Closed** or **Disqualified** Payment Plan details are also included if the end date of the these payment plans is within the cut off date and the due date of the Billing Extract

Process as defined in the parameter. This helps you to identify the last installment of any payment plan from the Billing Extract table.

Prerequisites

Credits and charges are created and applied.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To generate a bill for an individual student or for a group of students:

- 1. Run the Billing Extract concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, reference the following table.

The following table describes the parameters for the Billing Extract concurrent process.

Table 8–15 Billing Extract Process Parameters

Parameter	Description
Person Group ID	Select the group of students for whom the Billing Extract process needs to be run.
Party Number	Or select the Party Number if the process needs to be run for a single student. Specify either Person Number or Person ID Group. Both the parameters cannot be specified at the same time. This is an optional parameter.
Test Mode	The Billing Extract Process can be executed in the test mode to check for the accuracy of the transaction. Select No to generate the populate the Extract table with billing information.
Cutoff Date	The cutoff date refers to the date until which the various charges and credits are to be considered for billing. Cutoff date is a past date and all charges and credits until this date and even on this date are included for billing extract. This is a mandatory parameter.

Table 8–15 (Cont.) Billing Extract Process Parameters

Parameter	Description
Due Date	Due Date refers to the date by which the closing balance displayed in the bill extract must be paid. It can be any date in the future or even the current date. This is a mandatory parameter.
Remittance Address	The address to which the billed parties are to send the payments is specified by the remittance address. This is a mandatory parameter.
Bill To Address Usage 1	The bills are sent to addresses of the specified usage type. For example, bills can be sent to the residence address and work address. A maximum of three usage types can be specified for sending the bills. The first Bill To Address Usage is a mandatory parameter.
Bill To Address Usage 2	This is the second usage type for identifying the Bill To addresses. This is optional and can only be specified if the first Bill To Address is defined.
Bill To Address Usage 3	This is the third usage type for identifying the Bill To addresses. This is optional and can only be specified if the first and second Bill To Addresses are defined.

Note: The Billing History window is disabled if the Manage Accounts field in System Option window is set to Other. For information on the System Options window, refer to Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

3. To view the billing history of a student, query the appropriate person number in the Account Summary window.
4. Click **Billing History** to view the billing details generated. This displays the Billing History window.

8.6 Payment Plans

8.6.1 Overview

Higher education students are often required to pay significant tuition charges. You can define payment plans with multiple installments spread over time to facilitate payment.

Payment plans vary in terms of:

- Total amount to be paid
- Time period covered
- Number of installments
- Amount of each installment

You can restructure a payment plan at any time to reflect a student's changing financial needs. You can also create new payment plans as required. If students fail to make installments, you can apply holds and levy finance and late charges.

Payment plans are applicable only to students and do not apply to sponsors.

Installment payments are calculated as separate accounts from the existing account balance concept. For example, you assign a payment plan to a student in which the student has to pay \$5000 split into five installments of \$1000 each. In addition, the student also has an outstanding balance of \$2000 outside the payment plan which adds to \$7000 as the total outstanding balance. When a student makes an installment payment of \$500 with the credit class as *Installment Payments* in the Receipt window, the payment plan balance is updated to reflect $\$5000 - \$500 = \$4500$ and the amount is stored as credit and applied to the total charges only on running the Mass Application concurrent process.

If the student makes an installment payment of \$500 with the credit class as *Payments*, the amount is directly applied to the charges of the student. This will reduce the student charge to $(\$7000 - \$500) = \$6500$.

The processing fee when created is assessed as a charge on the student account for the administrative costs of the plan. It does not automatically adjust the installment balance. If the status of the plan is manually changed to *Active* or the concurrent process activates the payment plan, the charge is created using the fee amount, fee type, and fee period.

If the fee period in the payment plan template is different from the fee period defined in the Activate Payment Plan concurrent process, the fee period defined in the template will be overridden by the fee period parameter specified in the concurrent process.

8.6.2 Implementing Payment Plans

Implementing payment plans include:

- [Creating and Assigning a Payment Plan](#)
- [Activating Payment Plans](#)

- [Modifying Payment Plans](#)
- [Closing a Payment Plan](#)
- [Recording Installment Payments](#)

You can levy restrictions on students who miss payment plan installments by:

- [Applying Holds](#)
- [Releasing Holds](#)

8.6.2.1 Creating and Assigning a Payment Plan

You can create a payment plan for a student based on a payment plan template defined during setup. This template is called the master plan template. You can create multiple instances of a single master plan. Changes made to the instances of the master plan templates are applied only to that specific instance and not to the master.

A payment plan is in effect from the date the student enters into the contract until the due date of the last installment unless the plan is closed or disqualified. During this period of time, only one payment plan can be in effect. Any holds or finance and late charges applied during this period of time will be based on the total installment balance and not on the account balance.

By default, all installments are due on a set day of each month defined during setup. This fixed due date and interval is required for the Finance and Late Charge concurrent process to calculate late charges correctly. You can change the month payments are due and the frequency of the installments, for example, from monthly to bi-monthly, but you cannot change the due date. For more information, see [Modifying Payment Plans](#).

You can manually assign a plan to a student using the Students Payment Plan window or run the Assign Student to Payment Plan concurrent process to assign the payment plan to a group of students.

Prerequisites

A payment plan template is defined.

Person Group must exist.

Navigation

Student Finance > Maintain Payment Plans

Steps:

To assign a payment plan manually:

1. Select a payment plan in the appropriate student record and specify the start date applicable with the processing fee amount, the appropriate fee type, and fee period for the processing fee. The processing fee is optional and is picked up from the master plan template if defined. You can also delete the processing fee for an individual student.
2. The processing fee is not included as part of the payment plan balance. You must create a separate fee type to recover the processing fee. See the *Oracle Student System Implementation and Administration Guide*.
3. The start date must be a date later than the end date of the prior payment plan.
4. Specify the number for each installment you create and enter the month, year, and the amount due.
5. Enter values in numerical sequence, and do not skip numbers or sequence while modifying, changing, deleting, or adding installments.

To assign payment plans for a group of students:

6. Run the Assign Students to Payment Plan concurrent process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).
7. A new payment plan cannot be assigned to the student if there is a prior plan still open. This is to ensure that the student pays any outstanding installment balance before being assigned a new payment plan contract.
8. To set the parameters, reference the following table.

The following table describes the parameters for the Assign Students to Payment Plan concurrent process.

Table 8–16 Assign Students to Payment Plan Concurrent Process Parameters

Parameter	Description
Payment Plan Template	Select the appropriate payment plan template. This template is defined during setup.

Table 8–16 (Cont.) Assign Students to Payment Plan Concurrent Process Parameters

Parameter	Description
Person Group	Select the appropriate person group. If the person number is not known, query the appropriate person number. This is a mandatory parameter. The process will create the payment plan for all students in the given dynamic person group, using the start date provided and set the status for the Payment Plan to Planned .
Start Date	Enter the date to start plan. The start date cannot be earlier or equal to the end date of the any plan for a student. If so, then the process will continue but log a warning.
Processing Charge Fee Period	Enter the processing fee periods associated with the processing fee type defined in the payment plan template. The list of values for this field will display only if a fee period is associated with the processing fee type in the payment plan template selected above. If the payment plan template had no processing fee type defined, then the fee period list of values will not display any values.

8.6.2.2 Activating Payment Plans

Run the Activate Payment Plans concurrent process to activate the payment plans for a group of student. You can also manually activate a payment plan. Activation of a payment plan changes the plan status from **Planned** to **Activate**.

Prerequisites

Fee period must corresponds to an active fee period defined in FTCI and associated with the processing fee type.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps:

To activate payment plans for a group of students:

1. Run the Activate Payment Plans concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, reference the following table.

The following table describes the parameters for the Activate Payment Plan concurrent process.

Table 8–17 Activate Payment Plans Concurrent Process Parameters

Parameter	Description
Person Group	<p>Select the appropriate person group. If the person number is not known, query the appropriate person number. This is a mandatory parameter. The process will create the payment plan for all students in the given dynamic person group, using the start date provided and set the status for the Payment Plan to <i>Planned</i>.</p> <p>Use the Students Payment Plan window to assign a payment plan and activate it for a single student.</p>
Processing Charge Fee Period	<p>Enter the processing fee periods associated with the processing fee type defined in the payment plan template.</p> <p>The fee period entered must correspond to an active fee period defined in Fee Type Calendar Instance window and associated with the processing fee type.</p>
Installment Due Date Offset	<p>Enter the minimum number of days that must exist between the system date and the first installment due date.</p> <p>This is an optional parameter that can be used to prevent the first installment from becoming due immediately after the Payment Plan start date.</p>

8.6.2.3 Modifying Payment Plans

After you have assigned a payment plan to a student, you can manually modify the attributes of the plan at the student's request.

You can also change the status of a payment plan if required. Payment plans have four statuses:

- **Planned** - Default status assigned to a new payment plan
- **Active** - Status used to activate a payment plan
- **Close** - Status used to close a payment plan
- **Disqualified** - Status used to cancel a payment plan

Changing the status of a payment plan or altering it can have far reaching effects in the installment amounts to be paid by students and the way the application behaves. Consider the following before modifying a payment plan.

You can alter only outstanding payment plans. Partial payments can be altered only in terms of reducing or bringing down the installment due amount to zero, however, you cannot increase unpaid amounts or change the due dates for such amounts. Paid portion of the installment cannot be altered at all. Also, you cannot alter fully paid installments.

- You can change the installment due dates of a payment plan with **Planned** status without any restrictions. This includes changing the installment due date to a date before the start date.
- You can change the start dates of payment plans with **Planned** status but this will not change the installment due dates automatically. You have to manually alter the installment due dates.
- You must ensure that the planned start date is not greater than the system date when updating the status from **Planned** to **Active**.
- You must ensure that the system date is equal to or earlier than the first installment due date when updating the status from **Planned** to **Active**.
- The end date of a payment plan will always be updated by the system to reflect the due date of the last installment if the installment due dates are changed. This holds true for both planned and active payment plans.
- You cannot change the end date of a payment plan manually. You can change end dates by updating the last installment due date, paying off the entire outstanding plan amount, and manually setting the status from **Active** to **Closed** or **Disqualified**.
- You cannot set the installment due dates prior to the start date when updating the status from **Planned** to **Active**.
- You cannot change the installment due date of an active payment to a date that is earlier than the due date of a previous installment plan, that has a payment pending or a penalty against it.
- You cannot change the start date of an active payment plan.

Prerequisites

A payment plan is defined.

Navigation

Student Finance > Maintain Payment Plans

Additional Notes:

- You cannot change the status of a planned payment plan to **Disqualified** or **Close**.
- You cannot change the status of any **Disqualified** or **Close** payment plans.

8.6.2.4 Closing a Payment Plan

When a student has paid all the installments for a given payment plan, you can close that payment plan from the Student Payment Plans window or by running the Close Payment Plan Status concurrent process. This concurrent process identifies payment plans with zero balance or payment plans with a total plan balance less than or equal to a tolerance threshold and changes the status to **Closed**.

Prerequisites

Payments plans with the status **Active** must exist in the system.

Navigation

Student Finance > Maintain Payment Plans

Requests > Concurrent Manager > Requests > Run > Single Request

Steps:

To close a payment plan manually:

1. Query the appropriate record and select **Close** from the list of values in the Status field to close a payment plan.
2. A payment plan status cannot be altered once it has been closed.
3. Save your work.

To close payment plans for a group of students:

4. Run the **Close Payment Plan Status** concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

5. To set the parameters, reference the following table.

The following table describes the parameters for the Close Payment Plan Status concurrent process.

Table 8–18 *Close Payment Plan Status Concurrent Process Parameters*

Parameter	Description
Tolerance Threshold	Specify the threshold limit with zero as an allowable value. This is a mandatory parameter.
Person Group	Select the appropriate person group. If the person number is not known, query the appropriate person number. This is an optional parameter. If the person group is not defined, the concurrent process will assess all the students who has active payment plans.
Test Run	Select the Yes mode to trial run the process. It is recommended that you trail run the process first to analyze the changes as a closed payment plan cannot be reopened.

8.6.2.5 Recording Installment Payments

Installment payments are recorded in Student Finance using the Receipts window and a receipt is generated for each payment. When a receipt with the credit class of Installment Payments is recorded, it is immediately applied against outstanding installments on first in first out basis.

Installment payments can be paid over the counter at the Student Finance office, through the lockbox, or by using self-service.

The installment payments are applied to student charges when you run the mass application process.

If a student wants to make a payment partly towards an installment and partly to the account as a whole (for example, processing fee), then you must generate two separate receipts for each payment.

Payments recorded as *Installment Payments* credit type can be configured for refunds. To do so, you must create a record with a different credit class (*Deposit* or *Payments*) and then create a refund. If only a portion of the installment payment is to be refunded, then the original payment must be reversed and recorded as two different payments. One payment can be recorded as *Installment Payment* (non-refundable) as the credit class, while the other payment can be recorded with the *Payment* credit class which is refunded. You can use the Installment Applications window to view the applications of receipts to installments.

If a student is assigned to an *Active* payment plan, the refund process displays an warning.

Prerequisites

A payment plan is defined.

Navigation

Student Finance > Receipts

Steps:

1. Select **Installment Payments** from the Credit Class status list of values.
2. Enter the party and receipt number, credit type, credit instrument, and the required amount in the Receipts window.
3. If paying by credit card, you will enter an authorization code as received from the credit card processor.
4. Select **Installment Applications** to view details of the installments paid.
5. Select **Activities Details** to view all receipt details and related account information.

8.7 Working with Holds

When a student fails to pay fees within the specified time, you can apply holds to the student account. You can later release the holds when the student makes the required payment.

Holds can be categorized as *Administrative*, *Academic* or a combination of both. Administrative holds are applied when a student fails to meet administrative requirements, such as paying fees. You may apply one or more administrative holds on a student account. For instance, you can apply a hold that prevents all refunds, and another to block all study material. Academic holds are applied when a student's academic progress does not meet program or unit requirements. Student Finance deals only with administrative holds. Academic Holds are applied through the Person subsystem.

For more information on Holds, see [Person Holds](#), Person.

The restrictions applicable under each holds category are user-defined and are referred to as *Holds Effects*. Hold Effects are defined in the Person subsystem.

Holds application prevents the student from using the following administrative services.

- Claiming refunds

- Ordering transcripts
- Receiving study material
- Participating in Perkins Loan admission
- Participating in Registration
- Starting a unit attempt

In order to apply a hold, a hold plan has to be defined. The hold plan is defined in terms of a hold level and a hold type. A hold level can be Fee Type or Balance while Hold types are user-defined and attached to one or more system defined hold effects types. The system defined hold effects types are seeded and prevent the student from receiving certain administrative or academic services. You can define several hold types and name them accordingly. Since a user-defined hold is tied to one or more hold types, you can use a concurrent process to apply multiple hold types to a student. In addition to hold types, you must also define threshold limits for a plan. Threshold limits apply both to Fee Types and Balances hold levels. Threshold limits are defined in terms of:

- Threshold amount - If the fee type or the holds balance past due is greater than the holds threshold amount, then holds are applied.
- Threshold percentage - If the fee type or the holds balance past due is greater than the holds threshold percentage, then holds are applied.

Threshold amount and percentage are tied to a hold plan and are mutually exclusive. If neither of them is specified, then no hold plan is activated.

A holds plan is defined at two levels: *Fee Type* and *Balance*. At the Fee Type level, holds are applied based on the outstanding balance for all charges for a fee type in a given fee calendar. Whereas, at the Balance level, the current hold balance is considered for Holds application. Holds balance is derived by determining the amount available in a student's account after deduction of all charges at a given date. If the holds balance is past the due amount and the due date, and the outstanding holds balance is above the threshold limit, then a hold is applied.

Only *Balance* holds are released automatically when students make payments through self-service, OTC payments, and lockbox payments. *Fee Type* balances are released automatically only on payments through self-service. Automatic release of holds help students to immediately register for classes and perform activities on payment of outstanding dues, otherwise restricted by holds application.

8.7.1 Running the Holds Balance Conversion Concurrent Process

Holds are applied based on the total outstanding holds balance. You can specify waivers for fee types. These fee types are excluded from balance calculation. The outstanding balance for each charge is derived from the Charges table in Student Finance.

Hold balances are calculated and updated in real time based on the latest balance exclusion rules as and when charges and credits are created.

When credits are applied to charges, they reduce the outstanding balance of the individual charges used in assessing the fee type holds.

If you change a hold balance rule by changing the exclusion of Fee Types and Credit Types for the Holds Balance, a higher version of the Holds Balance definition is created. When a higher version of the hold balance is created, you must run the Holds Balance Conversion concurrent process to recalculate student balances. If the Holds Balance Conversion process is not run for the higher version created then the higher version is not active and is not used in the Holds processes. While running the concurrent process, you must specify the date from which the new rule will be effective.

Based on the conversion start date specified, the Hold Balance Conversion concurrent process determines if the specified conversion date is greater than the system date. If the conversion start date is greater than the system date the process logs an error message and does not proceed. If not, then the earliest process start date is selected from the holds table for active holds.

The process then determines the date from which the last balance rule was effective and applies the new balance rule from any date earlier than the last effective date. For example, if the last balance rule was effective from November 15, 2003, the Holds Balance Conversion process will apply the new balance rule from November 14, 2003. This is done to ensure that all student holds balances are calculated using the latest balance rule.

For additional information on running the Holds Balance Conversion Process, refer to [Validations](#) of this section.

Prerequisites

Hold plans and fee types are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Holds Balance Conversion Process concurrent process to update the charges and the credits transaction.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. This process has a single parameter, Conversion Start Date. Select the date from which the new balance rule will be effective. This is a mandatory parameter.

Validations

You must consider the following business rules when running the Holds Balance Conversion Process:

- The Holds Balance Conversion Process is a mandatory process that should be run once a new rule version is created.
- If the Holds Balance Conversion Process is unsuccessful then you must rerun the process after making appropriate modifications.
- After creating the new balance rule version, run the Holds Balance Conversion Concurrent Process followed by the Holds Release Process to re-evaluate the open financial holds and release them using the new balance rule.
- You cannot select a Process Start Date which is earlier than the conversion date for running the Holds Application Process.
- If you are a new customer, you must create a balance rule for Holds Balance. You need not run the Holds Balance Conversion Process the first time. The conversion date will be the current system date. If there is no Holds balance rule defined, then no transactions will be created.
- If you are an existing customer with no Balance Rule defined, then the upgrade process will create a Balance Rule with no exclusions. It will take the earliest balance date from the Balances Table and run the Holds Balance Conversion Process. The Earliest balance Date will be the Conversion Start Date.
- If you are an existing customer with one or more rules defined with null conversion date, then the latest rule version is considered. It will take the earliest transaction date and run the Holds Balance Conversion Process. The Earliest Transaction Date would be the Conversion Start Date for the latest version of the rule.
- The following Student Finance processes and APIs used for calculating holds will be locked when the Holds Balance Conversion Process is running.

- Charges API
- Credits API
- Credits Reversal Action
- Holds Application Process
- Holds Release Process
- Finance and Late Charge Process

The following details will be displayed in the log file for successful records:

- Person Number
- Balance Date
- Rule Version
- Balance Amount

8.7.2 Applying Holds

The Process Application of Finance Holds concurrent process applies holds to a student by looking at the definition of the hold plan at fee type and account balance level. You can apply multiple holds to block a student from receiving administrative services. You can also view a consolidated list of holds that have been applied to a student. Since a user-defined hold is tied to one or more hold types, the Process Application of Financial Holds application process can apply multiple hold types to a student.

The Process Application of Finance Holds can be run for a single student or a group of students. This process first determines whether the student account balance is past due and then identifies the latest active balance rule defined for calculating the holds balance amount. If this holds balance amount is more than the threshold limit, holds are applied.

However, if the *Balances* level type hold plan is selected for running this concurrent process, then the process determines if the student is on an *Active* payment plan. If yes, then the process evaluates the students based on their payment plan instead of their account balance, and applies the payment plan-specific threshold setups, if applicable.

Holds can be applied manually through the Account Summary window or through the Process Application of Finance Holds concurrent process.

Prerequisites

Hold plans and fee types are defined.

Navigation

Student Finance > Account Summary

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To apply holds to an individual student:

1. Query the person number in the Account Summary window and click **Holds**. The Person Holds Details window appears.

This window is disabled if the Manage Accounts field in the System Options window is set to Other. For information on the System Options window, refer to the *Oracle Student System Implementation and Administration Guide*.

2. Select the administrative radio button and then select the Include Expired Holds check box to apply expired holds that were released and assigned an expiry date.
3. Select the hold type, the appropriate term, and the start and the expiry date.

The term date cannot be earlier than the current date.

4. Save your work.
5. In the Hold Effects History window, click **Holds Effects History** to view the system holds applied, the start and expiration dates of the hold, and the administrative services withheld.

You cannot add new effects for expired hold types.

6. In the Person Holds window, click **Hold Effects Maintenance** to add or delete hold types.
7. Save your work.

To apply holds for a group of students:

8. Run the Process Application of Finance Holds concurrent process to update the charges and the credits transaction.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

9. To set the parameters, reference the following table.

The following table describes the parameters for the Process Application of Financial Holds concurrent process.

Table 8–19 Process Application of Financial Holds Parameters

Parameter	Description
Party Number	Party Number as defined in the Person Details window. This is an optional parameter.
Person Group	Displays a list of all the person groups defined in the Oracle Student System. Users cannot specify a closed Person ID Group. This is an optional field. Note: Specify only Person Number or Person ID Group. Both the parameters cannot be specified at the same time.
Process Start Date	Billing cycle cut off date
Process End Date	Select the payment due date.
Offset Days	Specify the number of days as grace period
Hold Plan Name	Select the name of the plan set up in the holds definition. Only active plans are displayed.
Fee Period	If the hold plan is defined at the fee type level, then the fee period is a mandatory parameter.
Test Run	If yes, this generates a report of students for whom holds would be placed but no hold is applied. If no, the holds get placed.

8.7.3 Releasing Holds

A hold applied to a student account can be released if the student pays the account balance due in case of an account balance level hold, or credits are applied to existing charges that push the balance below the threshold limit. Credits in the form of over-the-counter receipts, lockbox online payments or financial aid credits cause a hold to be released.

The administrator releasing the holds must have the same responsibility as the administrator who applied the hold. Administrators must have a party ID and should be an active staff member. Holds can also be released using a concurrent process. However, holds applied manually cannot be released by the concurrent process. They need to be released manually if the holds balance drops below the threshold limit.

Automatic release of hold occurs when the *Credit API* registers a payment. The *Credit API* then checks if the payment is an installment payment. If it is an installment payment, it applies the installment amount to the payment plan and determines if the student has an active hold and identifies the hold type.

If the student has holds applied, the Credit API verifies if the hold is *Fee Type* or *Balances* hold. In case of *Balances* hold, the Credit API calls the release hold process for evaluation of the hold.

If the hold is *Fee Type*, then the Credit API process ends as fee type holds are released only through self-service payments and not by the *Credit API*.

In case of non-installment payments, the API directly identifies active holds for given student and invokes the release hold process.

The Release Hold process is called to evaluate any Balance level holds whenever a payment is made through self-service, the receipts form or through the lockbox. Balance level holds will also be evaluated when a sponsorship or financial aid disbursement is made.

A Fee Type level hold will only be released automatically if the payment is made through self-service. Fee Type level holds will only be evaluated through use of the concurrent manager process or manually.

Prerequisites

Hold plans and fee types are defined.

Navigation

Student Finance > Account Summary

Requests > Concurrent Manager > Requests > Run > Single > Request

Steps

To release holds for an individual student:

1. Query the person number in the Account Summary window and then click **Release Holds**.

To release holds using the concurrent process:

2. Run the Process Release of Finance Hold concurrent process.

This concurrent process is not available if the Manage Accounts field in the System Options window is set to Null (blank) or Others. For information, see

Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

3. To set the parameters, reference the following table.

The following table describes the parameters for the Process Release of Finance Holds concurrent process.

Table 8–20 Process Release of Finance Holds Parameters

Parameter	Description
Person ID	Party Number as defined in the Person Details window. This is an optional parameter.
Person Group ID	Displays list of all the person groups defined in the Oracle Student System. Users cannot specify a closed Person ID Group. This is an optional field. Specify only Person Number or Person ID Group. Both the parameters cannot be specified at the same time.
Hold Plan Name	Name of the plan set up in the Holds Definition. If no hold plan name is specified, all active holds are processed for the student
Test Run	If Yes, then the process generates a report of students for whom the holds are released. If No, then the holds get released automatically.

Validations

The following business rules are considered for automatic release of holds.

- The Credits API validations includes all forms of credits, including financial aid, sponsorships, and receipts entered through various means.
- The Person Holds table is updated only if a hold is released, otherwise the credit ID is not recorded.
- A student's payment is recorded in Student Finance even if the holds release process fails. A message is displayed to this effect in the self-service payment confirmation page instead of any Hold Release confirmation.
- If the payment process is called from the Transcript Request process when a student orders for a document through self-service page, a specific targeted application is made against the charge.

8.8 Administering Student Sponsorships

Sponsors can pay for all or a portion of a student's tuition and other fees, for specific terms. The Sponsorships functionality captures sponsorships details, relates them to the student, and stores the data in Oracle Student System. Student Finance uses this data to create a disbursement credit on the student account, while Financial Aid uses this data in the calculation of aid requirements for a student.

Recording and maintaining sponsor payments in Student Finance involves:

- Defining Sponsor Details
- Running the Base Record - Create Financial Aid Base Record Process
- Running the Awards - Rollover Sponsorship Attributes Concurrent Process
- Assigning Students to Sponsors
- Running the Awards - Assign Sponsorship Awards Concurrent Process
- Running the Awards - Disbursements - Transfer to Student Accounts Concurrent Process
- Viewing Student Sponsorship Details
- Viewing Student Awards and Disbursement Details

To create sponsor details in Student Finance, it is mandatory that a fund type and a fund code exist for the sponsor.

Once sponsor details are recorded, you assign students to sponsors. You can assign an individual student or a group of students to a sponsor and then run a concurrent process. This concurrent process creates both awards and disbursements for a fund in the financial aid Award, Award Detail, and the Award Disbursement tables. The process checks for eligibility criteria and validations before making student awards.

The Student Finance office runs the Awards - Disbursements - Transfer to Student Accounts concurrent process to collect and transfer all eligible disbursement records from Financial Aid tables to Student Finance. This concurrent process creates a credit on the student's account and a charge in the associated sponsor's account. As a result, sponsor fund disbursements are displayed in the student's account and charges in the sponsor's account. Any adjustments to the disbursement are handled by creating the adjustment in both the student account and the sponsor account.

Payments from the sponsor are entered in the sponsor account. The billing process derives information for generating billing extracts from the sponsor and student account separately. When accounting information is recorded in General Ledger,

sponsor related accounting information is identified based on the sponsor fee type defined during setup. For example, sponsor payments are usually recorded against a sponsor fee type and not against a regular fee type in order to differentiate between sponsor and student payments.

8.8.1 Defining Sponsor Details

Before a student is assigned to sponsors, you must define sponsor details. These details are used by Oracle Student System to assign students to sponsors.

When creating sponsor details, you record information, such as the sponsor code, award year, and party number. You can also specify the minimum credit point and attendance type.

You create two accounts for each sponsor directly responsible for paying student fees. The first account is used to record payments toward student charges, while the second account is used for sponsor-related charges, such as finance and late charges levied on the sponsor. The link between the sponsor account, the student account, and the fund source is made in the Define Sponsor window by defining the Sponsor Fee type, Credit Type, and the Adjustment Fee Type.

The following describes the various fields, tabs, and regions in the Define Sponsor window.

Table 8–21 Define Sponsor field description table

Field	Description
Sponsors Code	Unique code associated with a sponsor during setup. All sponsors in Oracle Student System are identified by this code. When sponsor fund type is associated with a fund code, it appears in the Sponsor Code list of values.
Award Year	Award year associated with the sponsor fund code. This field displays the list of valid award years.
Party Number	Party number associated with the sponsor. The party number used to identify a sponsor party in the Define Sponsor window must be first identified as type <i>Organization</i> or <i>Institution</i> within Oracle Student System by creating or updating the Organization or Institution record in the Organization Structure Setup window.
Credit Type	Credit type set up for the student account disbursement. This credit type provides accounting for the sponsors funds disbursement on the student account.

Table 8–21 (Cont.) Define Sponsor field description table

Field	Description
Sponsor Fee Type	Fee Type used to create charge on the sponsor account linked to the student account disbursement.
Adjustment Fee type	Fee type used for negative adjustments to a fund disbursement on the student account.
Include as Planned Credit	Select this check box to indicate if you want to include planned credits in the student’s billing extract.
Pays Only Tab	
Fee Class	<p>Fee class is a categorization of fee types for which sponsors agree to provide funds. Examples of fee classes are Tuition, and Institutional Fees. The Fee Class list of value has certain pre-seeded values of Tuition, Program, Student, Institutional, Housing and Books. This list of value is also user extensible.</p> <p>If Pay Only fee classes are defined for a student, the corresponding student account must have one or more fee types categorized under a fee class, prior to the fund disbursement. There can be multiple Pays Only fee classes. The system checks for fee types linked to a fee class and transfers the amount or a percentage of the amount if percentage is specified.</p>
%	The award amount is determined by the percentage applied to the sum of the appropriate charges.
Max Amount	<p>Max amount the sponsor will pay under the given fee class. If only an amount is identified, then the award amount is same as the amount specified.</p> <p>If both the max amount and a percentage is identified, the charge is determined by calculating the percentage of the charge up to the max amount defined.</p>
Term Tab	
Term Calendar	Calendar defined for the term for which the sponsor fund is applicable.

You cannot navigate to the Program Details window using the Program Details button in the Define Sponsor window if the fee class is any other class than Tuition, or if you have specified fee percent or maximum amount for a fee class.

Prerequisites

Active Award Year, Term/Load Calendar rollover mappings are present in the Financial Aid calendar tables.

Awards - Rollover Fund Attributes process is run.

Party ID for the Sponsor has been defined.

Sponsor Party has been defined as an organization or institution in Oracle Student System.

Sponsor Fund Codes have been defined in the fund code window.

Credit Type of class SPNSP is defined in credit type window.

Sponsor fee types adjustment fee types have been defined in the fee type window.

Financial aid base records are created.

System Options are set up to support planned credits if the institution plans to award sponsorships in the status of planned.

Navigation

Student Finance > Define Sponsor

Steps

To define sponsor details:

1. Enter the sponsor code and description, and specify the award year, party number, sponsor reference number if applicable, credit type, adjustment fee type, and sponsor fee type.
2. The Term Details region displays the sponsor details and pays only details for the selected term.
3. Specify the minimum credit points and attendance type required for eligibility.
4. In the Terms tab:
 - Specify the term calendar for valid sponsors
 - Select the Closed check box if the sponsor is no longer valid, and specify the total sponsor amount.
 - Select the Include as Planned Credit check box to indicate if planned credits are to be included in the student bill extract.
 - Specify the person ID group associated with the sponsor to query for the sponsor.
 - In the Pays Only tab, specify the fee classes, or an amount or a percentage not to exceed a maximum amount.

- Click **Program Details** to modify or enter program details.
- 5. Click **Assign Student** to assign students to the sponsor in the Assign Student to Sponsor window.

If the status of the award year is **Legacy Details** or **Closed**, this becomes a view-only window.

8.8.2 Running the Base Record - Create Financial Aid Base Record Process

You run the Create Financial Aid Base Record concurrent process to collect person information from Oracle Student System records and create corresponding records in the Financial Aid subsystem. This concurrent process is a prerequisite for assigning students to sponsors and to initiate the sponsor award process.

The sponsor award process creates a financial aid base record automatically if one is not present for the student being processed. In such cases, you do not need to run this separately.

Prerequisites

Active Award Year, Term/Load Calendar rollover mappings are present in the Financial Aid calendar tables.

Awards - Rollover Fund Attributes process is run.

Party ID for the Sponsor has been defined.

Sponsor Party has been defined as an organization or institution in Oracle Student System.

Sponsor Fund Codes have been defined in the fund code window.

Credit Type of class SPNSP is defined in credit type window.

Sponsor fee types adjustment fee types have been defined in the fee type window.

Financial aid base records are created.

System Options are set up to support planned credits if the institution plans to award sponsorships in the status of planned.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To create financial aid base records:

1. Run the Base Record - Create Financial Aid Base Record concurrent process to update the charges and the credits transactions.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Base Record - Create Financial Aid Base Record concurrent process.

Table 8–22 Base Record - Create Financial Aid Base Record Parameters

Parameter	Description
Award Year	Select the award year for which the base record is to be created. This is a mandatory parameter.
Person Number	Select the person number of the student whose record is to be created.
Person ID Group	Select the group ID of the set of students for whom base records are to be created.

8.8.3 Running the Awards - Rollover Sponsorship Attributes Concurrent Process

You run the Awards - Rollover Sponsorship Attribute Concurrent Process to carry forward the sponsor setup details or sponsor-student relationships, or both to the next award year. You can specify which details are to be rolled over to the next award year.

Prerequisites

Active Award Year, Term/Load Calendar rollover mappings are present in the Financial Aid calendar tables.

Fund rollover process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To roll over sponsor setup details:

1. Run the Awards - Rollover Sponsorship Attributes Concurrent Process.
For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Awards - Rollover Sponsorship Attributes Process concurrent process.

Table 8–23 Awards - Rollover Sponsorship Attributes Concurrent Process Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Rollover	Select the type of rollover. You can choose a Sponsor-Student Relation Rollover, a Sponsor Setup Rollover or both. This is a mandatory parameter.
Sponsor Code	Select the sponsor code for which the rollover is to be done. This is a mandatory parameter.
Test Mode	Select Yes or No. Select No to commit the rollover. This is a mandatory parameter.

8.8.4 Assigning Students to Sponsors

After creating a sponsor, you assign students to the sponsor individually or in a group.

You can assign students with different funding requirements to the same sponsor. For example, a sponsor can have a policy to support tuition for full-time students only. However, the sponsor can make an exception to support an individual part-time student.

When assigning students to sponsors, you can override certain attributes in the sponsor record, such as the maximum amount that a student can receive in the *Pays Only* fee class. You can increase or decrease the amount as required for a group of students or for an individual student.

Students are assigned to sponsors manually and then funds from the specified sponsor are awarded to the students through the Awards - Assign Sponsorship Awards concurrent process.

Assignment of Students to Sponsors can also be performed through use of the sponsorship API, which creates a simple student sponsor relationship for sponsors already defined in Student Finance.

Prerequisites

Active Award Year, Term/Load Calendar rollover mappings are present in the Financial Aid calendar tables.

Sponsor details exist in the system.

Awards - Rollover Fund Attributes process is run.

Fund Type, Fund Code, System Year Mappings, and Fund Calendar Relations setups are complete.

Financial aid base records are created.

System Options are set up to support planned credits.

Navigation

Student Finance > Assign Students to Sponsor

Steps

To assign students to the sponsor:

1. Query the sponsor code for the sponsor to be assigned to the student in the Assign Students to Sponsor window. This displays the related term details, such as load calendar and the effective dates of the load calendar.
2. Enter the person number to be associated with this sponsor by each term. Optionally, you can select the Min. Attendance Type from the given list of values and enter Min. credit points applicable to the student.
3. Modify the total sponsor amount. If this is specified, then the Pays Only fee class and percentage of fee (or amount of fee) to be paid by the sponsor cannot be specified.
4. Optionally, click **Assign Student** in the Define Sponsor window to assign students to sponsor.

5. Click **Program Details** in the Assign Students to Sponsor window to specify the percentage or maximum amount at the program and unit levels.
If the percentage or amount of the tuition fee is specified or if the fee class is not Tuition, then the Assign Students to Sponsor window cannot be opened.
6. Click **Back** in the Program Details window to return to the Assign Students to Sponsor window.

8.8.5 Running the Awards - Assign Sponsorship Awards Concurrent Process

You run the Awards - Assign Sponsorship Awards concurrent process to create awards and disbursements for all students in a given award year, a specific student in an award year, or students within a person group. This concurrent process checks for eligibility criteria and validations before awarding the sponsor amount to the students.

To run this concurrent process, students must be assigned to the sponsors for the current award year. The process assigns awards for a specified student or a group of students.

Prerequisites

Active Award Year, Term/Load Calendar rollover mappings are present in the Financial Aid calendar tables.

Sponsor details are defined in the system.

Fund Type, Fund Code, System Year Mappings, and Fund Calendar Relations setups are complete.

Financial aid base records are created.

System Options are set up to support planned credits.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To assign sponsorship awards:

1. Run the Awards - Assign Sponsorship Awards concurrent process by specifying the award year, award type (actual or planned), and sponsor code and optionally, the term calendar.

The term calendar is enabled only when the award year is selected.

2. Optionally, specify a person number or person ID group.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

3. To set the parameters, reference the following table.

The following table describes the parameters for the Awards - Rollover Sponsorship Attributes Process concurrent process.

Table 8–24 Awards - Assign Sponsorship Awards Concurrent Process Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Term Calendar	Select the term calendar for which sponsor awards are to be generated. This is enabled only when Award Year Term Calendar is optional.
Person Number	Select the person number of the student for whom awards are to be generated.
Person Group	Select the person ID group for which awards are to be generated.
Sponsor Code	Select the sponsor code.
Award Type	Select the award type. You can choose either Actual or Planned. This is a mandatory parameter.
Test Mode	Select Yes or No. You can choose Yes to run the concurrent process in test mode. The award status gets updated in the Student Awards window only if the test mode is set to No. This is a mandatory parameter.

8.8.6 Running the Awards Transfer to Student Accounts Process

The Awards - Disbursements - Transfer to Student Accounts concurrent process collects all the eligible disbursement records and posts them to student accounts under student finance. Upon completion, the Amount Paid field is updated in the disbursement details, the award record, and the fund manager for each transaction.

The unique credit ID of the transaction that updated Student Finance is recorded in the invoice details tab of the Adjustment Details window.

Prerequisites

Aid Adjustment credit type is defined.

- Sponsor credit type is defined.
- Accounting information at the fee type level is defined.
- Award Disbursement with Actual status exists.
- Awards - Assign Sponsorship Awards Concurrent Process is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps:

To transfer disbursement records to Student Finance:

1. Run the Awards - Assign Sponsorship Awards concurrent process by specifying the award year, person number, person group, fund code, term calendar, and the GL date.

The Term Calendar and Sponsor Code fields are enabled only when the award year is selected.

2. Optionally, specify a person number or person ID group. One of the two must be specified.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

3. To set the parameters, reference the following table.

The following table describes the Awards - Disbursements - Transfer to Student Accounts concurrent process parameters.

Table 8–25 Awards - Disbursements - Transfer to Student Accounts Concurrent Process Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Select the person number.
Person Group	Select the person ID group.
Fund Code	Select the fund code.
Term Calendar	Select the term calendar.

**Table 8–25 (Cont.) Awards - Disbursements - Transfer to Student Accounts
Concurrent Process Parameters**

Parameter	Description
GL Date	<p>Select the general ledger date.</p> <p>This is a mandatory parameter.</p> <p>This date enables General Ledger to identify the GL period to which the transaction belongs.</p>

8.8.7 Viewing Student Sponsorship Details

You can view student sponsor and term details in the Student Sponsorships window. You can also view program details of students who are sponsored for specific programs.

Prerequisites

- Active Award Year, Term/Load Calendar rollover mappings are present in the Financial Aid calendar tables.
- Awards - Rollover Fund Attributes concurrent process is run.
- Fund Type, Fund Code, System Year Mappings, and Fund Calendar Relations setups are complete.
- Sponsor setup is complete.
- Financial aid base records are created.
- In the case of planned credits, system options are defined appropriately.

Navigation

Student Finance > Student Sponsorships

Steps

To view or modify details of students assigned to sponsors:

1. Query the appropriate student record in the Assign Students to Sponsor window.

The Term Details region displays details specified in the Sponsor Setup window. You cannot modify these details.

The person details and Pays Only details are displayed for the selected term. You can modify the details, if required.

2. Modify the minimum attendance type and minimum credit points required by the student.
3. Modify the total sponsor amount. If this is specified, then the Pays Only fee class and percentage of fee (or amount of fee) to be paid by the sponsor cannot be specified.

8.8.8 Viewing Student Awards and Disbursement Details

You can view student awards and disbursement details in the Student Sponsorships Awards window. You can modify only sponsorship details in the Student Sponsorships Awards window. Sponsorship funds are awarded to students through the Awards - Assign Sponsorship Awards concurrent process.

Sponsorship amounts are transferred to student accounts in the Student Finance subsystem using the Disburse Awards concurrent process.

Award disbursement details are created and maintained in the Financial Aid subsystem. For more information, see [Disbursing Awards](#), Financial Aid.

Prerequisites

Active Award Year, Term/Load Calendar rollover mappings are present in the Financial Aid calendar tables.

Awards - Rollover Fund Attributes process is run.

Fund Type, Fund Code, System Year Mappings, and Fund Calendar Relations setups are complete.

Sponsor setup is complete.

Financial aid base records are created.

In the case of planned credits, system options are defined appropriately.

Navigation

Student Finance > Student Awards

Steps

To view award details:

1. Query the appropriate student record in the Student Awards window.
2. Click **Disbursement Details** to view sponsor details in the Student Sponsor Award Details window.

3. Click **Disbursement Activity** to view specific disbursement details in the Disbursement Activities window.

To view or modify student sponsorship details:

4. Query the appropriate student record in the Student Sponsorships window.

The Term Details region details as specified in the Define Sponsor window are displayed. The Sponsor Details and Pays Only details are displayed for the selected term.

5. Modify the details as required and save your work. You can only specify either Total Sponsor amount, or Pays Only Fee Class (percentage or amount).

You cannot modify student details if an award has already been made.

8.9 Generating Refund

After credits are applied to the charges, the excess amount in the student's account is refunded back to the student or the sponsor. Students eligible for refunds are identified by running the Process Refunds for Excess Credits concurrent process that automatically identifies the student and calculates the appropriate refunds. However, you will have to apply refunds manually if any of the following situations exist:

- The student has excess credit amount after payment of dues exceeding the upper tolerance limit
- A Stop Refund hold is applied on the account
- The student has graduated and is not expected to reenroll for another academic program
- The excess credit amount calculated by a automated process exceeds the tolerance limit defined by the user
- The student has withdrawn from the institution for personal reasons
- The student is on approved leave of absence
- The student has received enrollment disqualification
- The student is not active
- The student is studying at another institution
- The student has unapplied excess Parent Loan for Undergraduate Student (PLUS) loan credit.

- Refunds for Parent Loan for Undergraduate Student (PLUS) loans are processed in a different way from regular refunds. PLUS loans offer parents credit to pay the education expenses of each child who is a dependent undergraduate student enrolled at least half time in an approved college or university. Borrowers can specify the account to be credited with the refund amount.
- After the PLUS loan is calculated, the amount is updated as credit in the student's account, and a concurrent process is called to check if there are any unapplied excess PLUS loan credit and to update the balances.
- In case of PLUS loan credit, Oracle Student System reviews the borrower's determination and refunds that amount accordingly. Borrowers can choose either to transfer the amount to the borrower's own account, pay to the student, or keep the excess on the student's account. For excess kept on account, there is no further processing. However, if the borrower's determines that refund is to be paid to the borrower or student, a refund transaction is created, and the refund amount is transferred to that account.

Administrators may set upper and lower tolerance limit to stop refunds that are too small to warrant administrative cost to refund. This limit is called the tolerance limit. If a refund amount is below or above the tolerance limit, administrators may do a manual refund.

Financial aid considerations also determine if a refund is to be done manually. For instance, financial aid recipients have an automatic hold placed on them to stop automatic refunds. In such cases, administrators must release the hold manually. Refunds of excess credits are also processed manually.

The charges resulting from refund assessment are stored in Student Finance and a refund voucher is generated. This voucher contains the details of excess credits that are transferred to the refunds table. Also, student accounts with holds need to have the hold released prior to any refund transfer.

8.9.1 Creating Refunds

To calculate the refunds, you must first run the mass application process to apply all credits to the charges. Next, you will run the concurrent process to calculate the refunds for eligible students.

Prerequisites

Fee types and account codes are defined.

Refunds setup in the System Options window is defined.

Refund tolerance setup and borrower details are defined.

Borrower is defined as a vendor in Account Payables.

Navigation

Student Finance > Refunds

Requests > Concurrent Manager > Requests > Run > Single Request

Student Finance > Borrower Details

Steps

To calculate refunds manually,

1. Enter or query the person number in the Refunds window.

The Refunds window is disabled if the Manage Accounts field in System Option window is set to Other or Null (blank). For information on the System Options window, refer to the *Oracle Student System Implementation and Administration Guide*.

2. Select the payee number, fee type, the GL date, and enter the amount to be refunded in the Refunds window. The voucher number is displayed by default and is system generated.
3. Enter the debit and the credit flexfield account numbers and codes, in the Accounts tab. Select appropriate values for the fund, organization, and object segment details in the Credit Account Flexfield window. The object segment is the natural account segment. The value for this segment must be of account type liability.

The information in the debit and the credit fields is derived from the System Options window and can be overridden.

4. Save your work.

To generate refunds for a group of students:

5. Run the Process Refunds for Excess Credits concurrent process to identify students eligible for refunds, and to calculate the refund amount.

If the student is inactive or if the student is assigned the study abroad Intermitt status with the intermission type attached, and study at another institution selected, then no automated refund is done.

You cannot create a refund transaction without payee information. A payee can be the student, sponsor, or the PLUS Loan borrower. If Oracle Financials is

installed, the status of the refund record is displayed. The status could be **to do**, **transferred**, or **offset** in case of reversal for a refund.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

6. To set the parameters, reference the following table.

The following table describes the parameters for the Process Refunds for Excess Credits concurrent process.

Table 8–26 Process Refunds for Excess Credits Parameters

Parameter	Description
Party Number	Select the party number as defined in the Person Details window. This is an optional parameter.
Person Group ID	Select the person ID group that displays list of all the person groups defined in the Oracle Student System. You cannot specify a closed Person ID Group. This is an optional parameter. Specify only Person Number or Person ID Group. Both the parameters cannot be specified at the same time.
Validate Add Drop	Specify if both Financial Aid and Non Financial Aid are to be processed for refund. Optionally, select Financial Aid for processing excess credits received as financial aid only and PLUS loans.
Test Run	If the concurrent process is run in the test mode, no refund transactions are created.
GL Date	The GL Date parameter is set to the system date by default. If the GL Date is not within the Open or Future status, then no value is defaulted in this field.

The Borrower Details window is disabled if the Manage Accounts field in System Option window is set to Other or Null (blank). For information on the System Options window, refer to the *Oracle Student System Implementation and Administration Guide*.

- 7. To refund a PLUS loan amount, query the person number in the Borrower Details window. The borrower’s details are displayed in the Borrower Details region. The Borrower Details window displays only PLUS Loans which have Parent Loan Borrower's information set up in Financial Aid.
- 8. The Borrower Detail window provides information regarding the PLUS Loan borrower's determination that specifies the person to whom the excess credits

are to be refunded. This person can be the student or the borrower.

9. If the PLUS Loan credit is sourced through financial aid, then financial aid will provide the system fund code attribute and the borrowers ID along with the PLUS Loan credits. The Loan Details field displays the same value that is displayed in the Loan Type field of the Loan Details window in Financial Aid.
10. Save your work.

Additional Notes

When a new refund is created:

- The GL date defaults to system date
- You can change or select the GL date for the refund voucher
- GL date is assigned to both the refund charge and the refund voucher transaction is created

When an existing record is modified:

- You can change the GL date with the status **OPEN** and **FUTURE**
- The GL date cannot be changed if the refund voucher is transferred
- If you change GL date for the refund voucher, this date is updated for refund change

See Also

For information on qualifier account type, see Chart of Account in the *Oracle General Ledger User Guide*.

8.9.2 Reversing Refunds

Refunds can also be reversed after the Process Refunds for Excess Credits concurrent process is run, if it is determined at a later date that the student has unpaid dues. Before reversal, a refund charge must be unapplied manually from the credit to which it is applied. After you create a refund, you must manually apply credits that are refunded to the refund charge and specify the account where the borrower wants the refund to be credited. Once you have created the refund, you must run the Transfer Refunds to Interface concurrent process to load refund information into the refunds interface table.

Perquisites

Fee types and account codes are defined.

Refunds setup in the system option is defined.

Refund tolerance setups and borrower details are defined.

Borrower is defined as a vendor in Account Payables.

Navigation

Student Finance > Refunds

Requests > Concurrent Manager > Requests > Run > Single Request

Additional Notes

- To reverse a refund, query the appropriate person record in the Refunds window and then select the voucher number in the Refunds section. Next, select Reversal and specify the GL date in the Reversal Details tab.
- The GL date is the date when a refund is credited to a student account. The source voucher number appears by default and corresponds to the refunds voucher number.

8.9.3 Transferring Refunds Information to Payables

After the refund amount for each student is calculated, the data is posted to an interface table within Student Finance. You can transfer this refunds voucher transactions data from the interface table directly to Oracle Accounts Payables if it is installed. If your institution has a third party payables system, the data is transferred to the refunds interface table and then to the third party payables system through a consulting solution for final disbursement to the student, sponsor, or the borrower.

In case of third party payables systems, the Refund Destination field in the System Options window is set to Other. In such cases, you need to run the Transfer Refunds to Interface concurrent process to transfer refund vouchers from the Refunds table to Refunds Interface table.

However, if the institution has Oracle Account Payables installed, then you need to run the Transfer Refunds to Oracle Payables concurrent process to transfer Refund data from the Refunds table to Accounts Payables Invoice and Invoice Line Interface tables.

Integration with Oracle Payables enables the transfer of the refund voucher created in Student Finance into Oracle Payables through interface tables. An invoice is thus created in Oracle Payables for the refund and payment made. While transferring from Oracle Student System tables to Oracle Student System interface tables, the process validates if the voucher is for a refund or for a refund reversal. In case of a reversal the process looks for an existing refund.

If a match is found, the process sets the voucher status to **Offset**. If no match exists, it sets the status to **Transferred**. When transferring vouchers between Oracle Student System and Oracle Payables, only those vouchers marked Transferred are moved.

Payment can only be made if an address exists for the payee in the Person subsystem. If an address exists but the party or payee mentioned on the refund voucher is not listed as a supplier in Oracle Payables, the process that transfers the refund voucher information as an invoice to Oracle Payables automatically creates this supplier with the address.

Prerequisites

Refund destination in the System Options window is defined as Payable or Other.

Default Supplier ID is defined.

Party ID is defined.

Pay To address is defined.

Responsibility

Oracle Student System Super User

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Student Finance > Refunds > Supplier Relationships > Supplier Relationships window

Steps

1. If your institution has Oracle Payables installed, run the Transfer Refunds to Oracle Payables concurrent process to automatically transfer refund details and to create a relationship between party and supplier. Enter the party number, and the person group, and specify if you want the process to create a supplier ID if it doesn't exist.

Also, select the invoice pay group, invoice payment term, and specify if you want to test run the process. The process transfers refunds details from the Refund Voucher table in Oracle Student System to Invoice in Oracle payable Invoice Interface table in Oracle Payable.

This concurrent process is not available if the Manage Accounts field in the System Options window is set to Null (blank) or Others. For information, see Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

- 2. To set the parameters, reference the following table.

The following table describes the parameters for the Transfer Refunds to Oracle Payable concurrent process.

Table 8–27 Transfer Refunds to Oracle Payables Concurrent Process Parameters

Parameter	Description
Party Number	Party Number as defined in the Person Details window. This is an optional parameter.
Person Group ID	Displays list of all the person groups defined in the Oracle Student System. Users cannot specify a closed Person ID Group. This is an optional parameter. Specify only Person Number or Person ID Group. Both the parameters cannot be specified at the same time.
Create Supplier	Select Yes to create a payee (person to whom the refund is to be made) account in the Student Finance Vendor relationship table. If the payee account already exists, select No. This is a mandatory parameter.
Supplier Type	This parameter provides the value to the Supplier Type Attribute in the vendors table if a new supplier is created for any person being processed for which there is no existing record in Oracle Payables. This is an optional parameter.
Invoice Pay Group	Select an invoice pay group from the LOV displayed. This parameter provides the value to the Pay group attribute in the Invoices interface table for the invoices. This is an optional parameter.
Invoice payment Term	Specify the invoice payment term from the LOV displayed. This parameter provides the value to the Payment Term attribute in the Invoices interface Table for the invoices. This is a mandatory parameter.

Table 8–27 (Cont.) Transfer Refunds to Oracle Payables Concurrent Process

Parameter	Description
Test Run	Select Yes to trial run the concurrent process. Select No to post the refund transactions to Oracle Payable.

If a relationship between party, supplier, and supplier site does not already exist, you must manually create the relationship.

To manually create a relationship between party, supplier, and supplier site:

3. Select the party number, supplier number, and the supplier site name in the Supplier Relationship window.
4. If your institution has a third party payables system other than Oracle Payables, run the Transfer Refunds to Interface process to load refund information into the refunds interface table.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

5. To set the parameters, reference the following table.

The following table describes the parameters for the Transfer Refunds to Interface concurrent process.

Table 8–28 Transfer Refunds to Interface Concurrent Process Parameters

Parameter	Description
Party Number	Party Number as defined in the Person Details window. This is an optional parameter.
Person Group	Displays list of all the person groups defined in the Oracle Student System. You cannot specify a closed Person ID Group. This is an optional parameter. Specify only Person Number or Person ID Group. Both the parameters cannot be specified at the same time.
Start Date	Specify the start date from which the refunds are to be posted to the Refunds Interface table.
End Date	Specify the end date until which the refunds are to be posted.
Test Run	Select No to trial run the concurrent process. Select No to transfer refunds to the Refunds Interface table.

Additional Notes

Based on the Oracle General Ledger setup in the System Options form, the accounting information is transferred to the Refunds Interface Table. If Oracle General Ledger is set to **Yes**, the account flexfield code combination ID is used otherwise the account code is used.

If you are currently using Oracle Payables and are now installing Oracle Student System, you should do the following:

- Identify the relationship between the party in Oracle Student System and the supplier and Supplier Site in Oracle Payables and load this relationship in the Student Finance Vendor Relationship table.
- Ensure that the address of the supplier site stored in the relationship table is also defined as an address in the Person subsystem with the Pay to Usage information defined, and that the supplier site address is active.

See Also

For information on Oracle Payable, see Payable Overview in the *Oracle Payable User Guide*.

8.10 Interfacing with General Ledger

Student Finance interacts with General Ledger through the GL interface. Oracle Student System is set up as a sub-ledger to General Ledger. Student Finance posts all the charges and credits for a student to the GL interface, which in turn, transfers them to General Ledger. However, if Oracle Financials is not installed, Student Finance posts the charges and credits to the posting interface by running a concurrent process and makes the transactions available to a non-Oracle general ledger system through the Posting Interface table.

GL interface has two salient features. First, with every charge, credit, and application transaction created, a GL date is attached. In addition, when a prospective student pays the admission application fee, a GL date is attached to the payment and stored in the admission application table. Later, when you run the concurrent process to transfer transaction data, it picks up the data from the admission application table and posts it to GL. GL dates are attached to each transaction as part of an accounting protocol that enables General Ledger to understand and store Oracle Student System transaction details.

Second, Student Finance posts all transactions to GL in the currency defined in the Set of Books in System Options in Oracle Student System. Set of Books contains information on accounting protocols to be used while interfacing with GL.

8.10.1 Transferring Refunds to Oracle General Ledger

You can transfer all the credit, charge, and application transaction details to GL by running a concurrent process only if Oracle GL is installed. The process first checks for the accounting method as defined in the System Option window. If the method is *accrual*, the process collects transaction data from the credit, charge, and application tables. However, if the accounting method is *cash*, the process collects only the credit and application transaction details and not the charge details.

When storing the credit, charge, and application transaction details, the process treats each transaction as two separate account entries, one for debit and the other for credit accounts. The process then obtains the flexfields code combination ID (CCID) for debit and credit account for each transaction and interchanges the debit and credit amount for negative credits. Next, the process inserts the transaction into the GL interface table as per the posting parameter specified. The posting parameter options can either be *Summary* or *Detail*.

The concurrent process then updates the transaction details in Student Finance. However, for negative credit, the process interchanges the debit and credit entries. If you choose to call the import process for uploading the journal, then the appropriate process is run or else the process report is generated.

Prerequisites

Systems Options are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. If Oracle GL is installed, run the General Ledger Interface Process concurrent process to post the charges and credits of a student to the GL interface table. Specify the GL start date, posted details, and end date. Also, specify the posting details and indicate if you want to run the Journal Import process.

If there is no data in the interface table, the Journal Import Process is not triggered even if the Run Journal Import parameter is set to **Yes**.

This concurrent process is not available if the Manage Accounts field in the System Options window is set to Null (blank) or Others. For information, see Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the General Ledger Interface Process concurrent process.

Table 8–29 General Ledger Interface Process Parameters

Parameter	Description
GL Date Start	Select the GL start date from which the credits and charges transactions are to be posted to GL Interface table. This is a mandatory parameter.
GL Date End	Select the GL end date until which the credits and charges transactions are to be posted to GL Interface table. This is a mandatory parameter.
Posting Detail	Use this parameter to specify if the transactions to be posted to GL are to be in the summary or detailed format. This is a mandatory parameter.
GL Posted Date	This is date on which the concurrent process is run. This is a mandatory parameter.
Run Journal Import	Specify the Run Journal Import as Yes if the charges and credits transactions are to be uploaded to the Journal. This is a mandatory parameter. If there is no data in the interface table, the Journal Import Process is not triggered even if the Run Journal Import parameter is set to Yes.

Additional Notes

If you select the value for Oracle Financials as **Yes** and select Set Of Books for configuring the system options, then the currency defaults to the currency specified in the Set Of Books. You cannot update values in such cases.

If you select the value for Oracle Financials as **No**, then you can specify the local currency as saved in the record.

GL functions on the basis of the following accounting periods:

- Not opened when the period has never been opened. Any new period created in a calendar would be assigned this account period by default
- Future when a period is yet to be opened. You can create transactions in this period, but cannot post to GL

- Open when transaction entry and posting to GL are allowed in the Open period. The only change allowed from **Open** is to **Close Pending** or **Closed**
- Closed when the accounting period is closed to transaction entries and posting to GL are not allowed
- Close Pending when the period is similar to Close but no validation is done for unposted items. So you can change the status of the period from **Open** to **Close Pending** without posting all the transaction to GL interface table

8.10.2 Transferring Refunds to a non-Oracle General Ledger

You run the Posting Interface Process concurrent process to transfer credits, charges, and application details to any non-Oracle accounting solution.

Prerequisites

Systems Options are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. If Oracle GL is not installed, run the Posting Interface process to post the transactions to a non Oracle General Ledger system. Enter the start GL date, end GL date and GL posted date.

This concurrent process is not available if the Manage Accounts field in the System Options window is set to Null (blank) or Others. For information, see *Setting Up System Options* section in the *Oracle Student System Implementation and Administration Guide*.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Posting Interface process concurrent process.

Table 8–30 Posting Interface Process Concurrent Process Parameters

Parameter	Description
GL Start Date	Select the GL start date from which the credits and charges transactions are to be posted to Posting Interface table. This is a mandatory parameter.
GL End Date	Select the GL end date until which the credits and charges transactions are to be posted to Posting Interface table. This is a mandatory parameter.
GL Posted Date	This is date on which the concurrent process is run. This is a mandatory parameter.

8.10.3 Transferring Unposted Transactions

The process fails to post all transactions data to the GL interface table if the data is not in the format recognized by GL interface table. To post such data, the process obtains all the unposted transactions which have a GL date and fall within the process execution start and date range. These transactions are mapped with the journal source and category. Also, the accounting period specified in Student Finance must match with the accounting period in GL. For example, if the open period in Student Finance is from June to March, then the same period must be an open period in GL.

To identify transactions that failed to get posted to GL, fee administrators can run the Unposted Items Report which provides information on transactions that failed to get posted to the GL from the GL interface table or Posting Interface table. These transactions include information from the charges line, credit activities, and applications table. This report is available whether or not Oracle Financials is installed by the institution, and is divided into two sections, Error Transactions and Unposted Transactions.

Prerequisites

Systems Options are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To view the list of unposted transactions:

1. Run the Unposted Items Report. Enter the GL date for which you want to generate the report and specify the Group By parameter by which you want to group the report.

Note: This report is not available if the Manage Accounts field in the System Options window is set to Null (blank) or Others. For information, see Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Unposted Items Report concurrent process.

Table 8–31 Unposted Items Report Parameters

Parameter	Description
As of GL Date	Select the GL date from the Standard Oracle Calendar displayed. This is a mandatory parameter.
Group By	Specify the parameter by which to group the unposted transactions. This is a mandatory parameter.

Note: The **Actions...1** button in this window is disabled if the Manage Accounts field in the System Options window is set to Others. For information, see Setting Up System Options section in the *Oracle Student System Implementation and Administration Guide*.

To view the transaction details, click **Credit History** in the Account Summary window. This displays the Credit History window.

Additional Notes

While running the concurrent process to generate the unposted items report, you can specify the following parameters (Group By Values) to be displayed in the Unposted section of the report.

- None - group the unposted records randomly.
- Accounting Period - group by the account period for which the concurrent process is run.
- Account - group by account numbers.

- Accounting Period and Account - group by both accounting period and account numbers.

If Oracle Financials is installed then all four Group By Values are available. However, if Oracle Financials is not installed, then only the None Group By parameter is available.

8.10.4 Transfer to Commercial Receivables Interface

If you choose to use any other commercial receivables module to manage your accounts other than Student Finance, then you can only assess student fees in Student Finance. After fee assessment is done in Student Finance, the data is stored in the Charges and Credits tables within Student Finance. Fee administrators need to run the Transfer to Commercial Receivables Interface Concurrent Request to transfer the data to an interface table. The commercial receivables module picks up the data from this interface table for its use.

The concurrent process transfers charges with the following fee types only:

- Tuition
- Sponsor
- External
- Ancillary
- Document
- Aid Adjustment

Note: All System Fee Types with exception of refunds, and finance and late charges are to be exported. No application tables are transferred to the interface table.

The credit classes transferred by the concurrent process include:

- Sponsorship
- Negative Adjustment Credits

All records successfully transferred to the interface table are marked either in the Charges or Credits table as successfully exported. This prevents the same records from being exported twice.

The export process sweeps all transactions from Oracle Student System transaction tables into the interface table. Records that fail validations are written to an output log file. Fee administrators need to check this log file to correct erroneous records

within Oracle Student System and then run the export process to resubmit the records to the interface table.

Prerequisites

Commercial Receivables or any other account management system is selected in the System Options window.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To transfer fee assessment data to an interface table:

1. Run the Transfer to Commercial Receivables Interface concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

This concurrent process has no parameters.

Financial Aid

The term *financial aid* refers to the monetary assistance provided to students and their families in the form of grants, loans, sponsorships, and work-study funds. Based on student need, government and third-party organizations provide various combinations of funds to help families cover educational costs. The Financial Aid subsystem manages the process of awarding financial aid to students.

This chapter details the following topics:

- [What's New in This Release](#)
- [Financial Aid Overview](#)
- [Processing Applications](#)
- [Processing Awards](#)
- [Processing Federal Pell Grant](#)
- [Processing Student Loans](#)
- [Managing Student Employment](#)
- [Managing Sponsorships](#)
- [Disbursing Awards](#)
- [Tracking Satisfactory Academic Progress](#)

9.1 What's New in This Release

In this release, Oracle Student System has the following new and modified features.

- [Multiple Distribution Methods](#)
- [Removal of ISIR Requirement for Awarding Funds](#)

- Support for Institutional Methodology
- Loan-related Enhancements
- Enhancements to the Verification Process
- Support for Multiple Financial Aid Offices
- Expected Family Contribution Calculation Changes
- PROFILE Updates
- ISIR Updates
- Pell Grant Enhancements
- Obsoleting the Financial Aid Base Record History Functionality
- Updating Cost of Attendance
- External Award Importing
- Business Views

9.1.1 Multiple Distribution Methods

In earlier releases, awards were distributed based on the distribution method associated with each fund (defined in the Fund Manager window during setup). This implied that regardless of the student program or other characteristics, the fund was distributed the same way to all students who were awarded the fund.

Since different programs or other student characteristics can require different ways to distribute awards, the current release introduces *Disbursement Plans*. Disbursement plans are independent of funds and provide multiple methods for award disbursement. You can create multiple disbursement plans and associate one or more disbursement plans to an award group and to funds within an award group while awarding funds. Disbursement plans are also used when manually awarding funds.

9.1.2 Removal of ISIR Requirement for Awarding Funds

In earlier releases, Institutional Student Information Report (ISIR) records were required to automatically and manually award funds to students. In the current release, the ISIR requirement for awarding funds is removed allowing you to:

- Run a process to automatically award non-federal funds to students without ISIR records

- Manually award all types of funds to students without ISIR records

9.1.3 Support for Institutional Methodology

The current release reintroduces the College Board's Institutional Methodology (IM) as an option to award funds by using PROFILE data. Currently, the Financial Aid subsystem provides only partial support for IM because it is not integrated with the College Board's IM Calculator, Institutional Need Analysis System (INAS).

9.1.4 Loan-related Enhancements

In earlier releases, you could only define one default lender for creating student loan records in an award year. The current release includes loan-related enhancements that facilitate processing and maintenance of loan data. You can now assign a lender to a borrower, prior to the awarding and origination of a loan. You can also assign a default lender for student Federal Family Education Loan Program (FFELP) loans prior to origination. In addition, PLUS loan borrower details are now derived from the Person subsystem.

9.1.5 Enhancements to the Verification Process

In the current release, the verification process is enhanced. You can now enter and verify documented values for verification items by using new self-service pages.

9.1.6 Support for Multiple Financial Aid Offices

Educational institutions can now define multiple identifiers, such as office of post-secondary education identification number (OPE ID), federal school code, attending campus pell ID, and reporting Pell ID for each financial aid office at the organizational unit level. The financial aid offices use these identifiers to communicate with and report to the external agencies, such as U.S. Department of Education and Common Origination and Disbursement (COD) system.

9.1.7 Expected Family Contribution Calculation Changes

The Financial Aid subsystem calculates Expected Family Contribution (EFC) for students based on the specifications defined by the U.S. Department of Education. The U.S. Department of Education publishes new specifications every year. The current release includes enhancements to the EFC calculation engine based on specifications for 2004-05.

9.1.8 PROFILE Updates

The College Board modifies the PROFILE record layout every award year. For the 2004-05 award year, the College Board delivers the PROFILE records in a layout shorter than the one used for 2003-04. This release includes support for the new PROFILE record layout.

9.1.9 ISIR Updates

The Central Processing System (CPS) of the U.S. Department of Education modifies the ISIR record layout every award year. This release includes support for the new ISIR record layout.

9.1.10 Pell Grant Enhancements

In earlier releases, the application only used Federal Pell Grant Formula 1 to award Pell Grant. The current release supports Formulas 1, 2, and 3. In addition, the current release includes functionality to calculate the Cost of Attendance (COA) for Pell Grant recipients with *less than half time* attendance type.

9.1.11 Obsoleting the Financial Aid Base Record History Functionality

In earlier releases, the Financial Aid Base Record History functionality was used to create a repository of Oracle Student System data that was used by the Financial Aid subsystem. The current release provides improved integration between the Financial Aid subsystem and Oracle Student System by allowing direct access to the other subsystems. Also, the earlier Financial Aid Data Change Workflow functionality is removed. You can now subscribe to new seeded workflow business events throughout the application.

9.1.12 Updating Cost of Attendance

In earlier releases, a student's COA could only be updated manually at the student level. The current release allows for assignment of COA Groups with an update feature if you want to change a student's COA group assignments and recalculate.

9.1.13 External Award Importing

External Awards from third parties can now be imported by using the (Legacy) Award interface tables.

9.1.14 Business Views

This current release provides business views for financial aid data. These views are based on logical data model entities and can be used with analytical tools, such as Discoverer. In addition, the views contain meaningful column and view names using business terminology.

9.2 Financial Aid Overview

The Financial Aid subsystem allows you to manage the complete financial aid process from end-to-end. It provides features using which you can manage the entire cycle starting with the initial receipt of applications through all the necessary processing steps, such as eligibility processing, awarding, disbursing, monitoring, and reporting.

The subsystem is extremely flexible and can be configured to meet the unique processing requirements of your educational institution.

Processing financial aid involves the following activities:

- [Processing Applications](#)
- [Processing Awards](#)
- [Processing Federal Pell Grant](#)
- [Processing Student Loans](#)
- [Managing Student Employment](#)
- [Managing Sponsorships](#)
- [Disbursing Awards](#)
- [Tracking Satisfactory Academic Progress](#)

9.2.1 Processing Applications

Processing applications includes receiving, reviewing, and evaluating applications. Institutions can receive, process, and manage ISIR and PROFILE applications. The subsystem facilitates verification of the applications by providing an automated verification process. It also allows automated submission and receipt of corrections to the CPS.

Using the subsystem, you can perform the following tasks to manage and process applications:

- Receive ISIR and PROFILE applications electronically
- Import, view, and modify ISIR records
- Import, view, and modify PROFILE records
- Create and maintain award year-based student records
- Review and verify applications
- Assign and track missing or required student information
- Communicate with students to request for required information
- Verify student information by comparing ISIR data with obtained student data
- Configure the application to calculate student EFC based on Federal Methodology (FM) or IM
- Recalculate student FM-based EFC and use it to award funds to students
- Generate, transmit, and receive application corrections

9.2.2 Processing Awards

Processing awards includes determining student need and managing the distribution of funds among the students. The subsystem also includes packaging and fund management features that provide you the flexibility to determine the packaging policy for a group or an individual.

Using the subsystem, you can perform the following tasks to manage awarding:

- Define unlimited number of financial aid funds for awarding
- Define multiple attributes for each fund or award group to control the awarding
- Define and associate disbursement plans to an award group and to funds within an award group to distribute awards in different ways
- Define and maintain multiple COA types and groups
- Manipulate COA at student and global levels
- Recalculate student need if student characteristics, such as enrollment or admission status, change
- Automatically award a fund regardless of whether the fund is federal, state, institutional, or a third-party fund

- Directly process complete applications by using the automated awarding process
- Maintain and track the awarded funds
- Maintain history of offered awards, accepted and declined awards, disbursements paid and deferred at the fund and student levels

9.2.3 Processing Federal Pell Grant

Oracle Student System allows processing of Federal Pell Grant for institutions using Pell Formulas 1, 2, and 3. It also supports the use of multiple Pell IDs for processing and reporting Pell Grant data.

Using the subsystem, you can perform the following tasks to manage Pell Grant:

- Create and maintain Pell origination and disbursement records
- Interact with COD to report Pell origination and disbursement records
- Receive and import Pell origination and disbursement acknowledgements
- Manage origination and disbursement-related details
- Maintain Pell Grant data

9.2.4 Processing Student Loans

You can award, manage, and process the Federal Direct, FFELP, Alternative, and Perkins loans. The subsystem allows you to originate Direct and FFELP loans and receive funds for loans electronically.

Using the subsystem, you can perform the following tasks to process student loans:

- Create loan records
- Manage loan origination and disbursement
- Interact with COD to report Direct Loan data
- Interact with external processors to report FFELP and Alternative loan data
- Process promissory notes for Direct Loans
- View, update, and maintain loan-related information

9.2.5 Managing Student Employment

The Financial Aid subsystem allows institutions to manage student employment details and maintain data relevant to work-study awards. You can integrate the subsystem with the Oracle Human Resource/Payroll system to process payroll details, maintain HR records, and export data to off-campus HR systems.

Using the subsystem, you can perform the following tasks to manage student employment:

- Manage job listings of on- and off-campus positions
- Track details specific to work-study awards
- Create work authorization files
- Define the earning limit for each student
- Maintain details of student earnings
- Alert the student and employer when a student approaches the defined earning limit

9.2.6 Managing Sponsorships

Although sponsorships are a form of financial aid, the Sponsorships functionality is primarily contained in the Student Finance subsystem.

After a student is assigned to a sponsor in the Student Finance subsystem, you can use the Financial Aid subsystem to maintain sponsor payment details and track the percentage of the fees or the amount the sponsor is willing to pay. In addition, you can view student award and disbursement details.

9.2.7 Disbursing Awards

The financial aid process is complete when the funds are disbursed to students, disbursement records are created, and the disbursement data is transferred to student accounts under the Student Finance subsystem. After disbursement is complete, each student's account is updated with the disbursement information.

Using the subsystem, you can perform the following disbursement-related tasks:

- Verify disbursement records
- Maintain disbursement details
- Maintain disbursement holds

9.2.8 Tracking Satisfactory Academic Progress

You can track, monitor, and review student academic progress for continuing financial aid. The Academic Records subsystem of Oracle Student System allows you to define rules used to monitor student progress.

After the rules are defined, you can use the Financial Aid subsystem to perform the following tasks:

- Hold awarding of all funds for a student
- Hold awarding of specific funds for a student
- Hold disbursement of all funds for a student
- Hold disbursement of specific funds for a student

9.3 Processing Applications

9.3.1 Overview

Students in the United States submit applications for financial aid to the U.S. Department of Education, College Board of College Scholarship Services (CSS), or educational institution. The U.S. Department of Education collects data through the Free Application for Federal Student Aid (FAFSA) form and sends the data to the educational institution in the form of an ISIR. PROFILE records are generated by the College Board and sent to institutions as a result of PROFILE applications submitted by students. Thus, educational institutions receive student applications or data in the form of ISIR records, PROFILE records, and institutional applications.

Processing applications involves the following tasks:

- [Managing ISIR Records](#)
- [Maintaining To Do and Verification Items](#)
- [Managing ISIR Corrections](#)
- [Managing PROFILE Records](#)
- [Reviewing Unmatched ISIR and PROFILE Records](#)
- [Maintaining Financial Aid Base Records](#)
- [Maintaining Institutional Applications](#)

Institutions use ISIR data to determine student eligibility for financial aid. For more information on managing ISIR records, refer to [Managing ISIR Records](#).

Data in ISIR fields can be verified by creating a *verification item* for each ISIR item to be verified. To validate a verification item, you request for data and documents from the student. To assist in tracking the receipt of data for verification, *To Do items* are added to a student's To Do Item list. To Do Items can also be used to track other items unrelated to verification items. For more information on managing verification and To Do items, refer to [Maintaining To Do and Verification Items](#).

After the institution receives the data and documents, you record the received value as a documentation value for the verification item. Each documentation value is compared against the corresponding ISIR field value in the Payment ISIR record. If discrepancies exist, ISIR correction items are created. You can also create ISIR correction items that are unrelated to verification items. The correction items are sent to CPS in the form of a correction record for review and processing. As a result, CPS generates a Correction ISIR record and sends it to the institution. For more information on managing ISIR corrections, refer to [Managing ISIR Corrections](#).

Institutions use PROFILE records to determine student EFC for awarding financial aid. For more information about maintaining PROFILE records, refer to [Managing PROFILE Records](#).

ISIR and PROFILE records are imported based on the matching criteria specified during setup. For more information, see the *Oracle Student System Implementation and Administration Guide*. Records that either partially match or do not match the specified criteria are not imported. You need to manually review the unmatched records. For more information about reviewing unmatched records, refer to [Reviewing Unmatched ISIR and PROFILE Records](#).

The financial aid base record is a repository of student information. It stores student-specific information related to financial aid, admissions, needs analysis, awards, and enrollments. You can use the financial aid base record to get key information about a student. A financial aid base record can be created in the following ways:

- Importing an ISIR record
- Importing a PROFILE record
- Running the Base Record - Create Financial Aid Base Record concurrent process
- Manually while reviewing unmatched ISIR or PROFILE records

For more information on managing financial aid base records, refer to [Maintaining Financial Aid Base Records](#).

Educational institutions may require additional information from students. Using Institutional Applications, institutions define questions and track students'

responses. For more information on managing Institutional Applications, refer to [Maintaining Institutional Applications](#).

9.3.2 Managing ISIR Records

The Financial Aid subsystem provides complete support for the FM formula calculations. Using the subsystem, you can manage and maintain student ISIR records for different award years. You can upload and import ISIR records regardless of the source.

In addition, you can view and compare student ISIR data as it pertains to the FAFSA application, CPS processed data, and National Student Loan Data System (NSLDS) loan information. If required, you can modify an ISIR record, recalculate EFC, and save the results either as an internally generated Simulation ISIR or Correction ISIR. You can also create correction items that can be sent to the CPS for processing.

Managing ISIR records includes the following tasks:

- [Importing ISIR Records](#)
- [Viewing ISIR Batch Details](#)
- [Viewing ISIR Records Summary](#)
- [Viewing ISIR Record Details](#)
- [Modifying ISIR Records](#)
- [Comparing ISIR Records](#)

9.3.2.1 Importing ISIR Records

ISIR records are imported in two stages: loading ISIR records into temporary tables and importing data from the temporary tables into Oracle Student System. Run the ISIR Loader Process and ISIR Import Process concurrent processes to import the ISIR records.

ISIR Loader Process

The ISIR Loader Process concurrent process loads CPS-generated ISIR flat files from an external location to the ISIR temporary table in Oracle Student System.

Prerequisites

Application processing parameters are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the ISIR Loader Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. This process has a single parameter, Data File with Path. Enter the full path and name of the file to be imported as the value for the parameter. This is a mandatory parameter.

After loading ISIR records, you can validate the loaded data. For more information, refer to [Viewing ISIR Batch Details](#).

ISIR Import Process

The ISIR Import Process picks up ISIR data from the temporary table and imports it into Oracle Student System based on the matching criteria defined during setup. The ISIR Import Process concurrent process performs the following tasks:

- Matches ISIR records to person records in Oracle Student System - The process searches for student information, such as social security number (SSN), first name, last name, date of birth, address, city, and zip code.
- Performs the following tasks for matched records:
 - Adds the ISIR record to the student record
 - Creates or updates the financial aid base record
 - Creates the e-mail and primary address for the student in the Person subsystem
- Performs one of the following tasks for unmatched records based on the selected parameters:
 - Creates a person record (if the Create Person Record on No Match parameter is selected) and financial aid base record
 - Leaves the unmatched records in the temporary table
- Creates Admission Inquiry entries for:
 - Matched records if the Create Admission Inquiry parameter is set to **Yes**

- Unmatched records if the Create Admission Inquiry and Create Person Record on No Match parameters are set to **Yes**
- Imports ISIR records to the ISIR transaction tables
- Sets the ISIR as the Payment ISIR if it is the first ISIR imported for the student and has a valid EFC, regardless of the source of the ISIR. If the ISIR is not the first ISIR to be imported, the ISIR is set as the Payment ISIR only if it fulfills the following requirements:
 - Source of the ISIR is the educational institution.
 - ISIR contains a valid EFC value.
 - For a Correction ISIR, the correction items from the ISIR record match the correction items with a correction status of **Batched**.

Note: If you import multiple ISIR records for a student, the records are listed in ascending order. The highest Transaction ID that fulfills the Payment ISIR requirements is set as the Payment ISIR.

When you run the ISIR Import Process concurrent process, a log file is generated. You can view the log file to check if all the data was imported. The log file also lists the errors encountered during the import process. For information on viewing log files, refer to [Concurrent Process Procedures](#).

The ISIR Import Process concurrent process when rerun, matches the remaining records in the temporary table assuming that new person records are created meanwhile.

Prerequisites

The record matching criteria are defined.

The Manual Review check box in the Application Processing Parameters window is selected.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the ISIR Import Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the ISIR Import Process concurrent process.

Table 9–1 ISIR Import Process Parameters

Parameters	Description
Award Year	Select the award year. This is a mandatory parameter.
Create Person Record on No Match	Select Yes or No . Select Yes to automatically create person records and financial aid base records for unmatched records. Select No to manually review unmatched ISIR records. This is a mandatory parameter.
Create Admission Inquiry	Select Yes or No . Select Yes to create admission inquiry records for matched records. If you select Yes and set the Create Person Record on No Match parameter to Yes , the process creates admission inquiry records for unmatched records. This is a mandatory parameter.

Table 9–1 (Cont.) ISIR Import Process Parameters

Parameters	Description
Admission Inquiry Method	<p>Select the admission inquiry method. This field is enabled only if the Create Admission Inquiry parameter is set to Yes. The available admission inquiry methods are:</p> <ul style="list-style-type: none"> ■ College fair ■ E-mail ■ Fax ■ Friend recommendation ■ Grandparents ■ High school guidance counselor ■ Institutional coach recruiting ■ Institutional mailing ■ Letter ■ Other source ■ Parents ■ Phone ■ Television advertisement ■ User ■ Voice Messages ■ Web

9.3.2.2 Viewing ISIR Batch Details

CPS sends ISIR records as batch files, where each batch file contains multiple ISIR records. The batch files have header and trailer records that store information related to student records. You can use the trailer record of a batch file to validate batch file data.

After you run the ISIR Loader Process concurrent process, you use the ISIR Batch Details window to check if all the records in the batch are loaded. You can query for a batch to view and evaluate batch details.

Prerequisites

ISIR records are loaded.

Navigation

Financial Aid > Financial Aid Data Receipt > ISIR Batch Details

Additional Notes

You can only view batch details for the year 2003-04. For the year 2004-05, CPS has modified the ISIR format and the new format does not support header and trailer records. Thus, you cannot view batch details for the year 2004-05.

9.3.2.3 Viewing ISIR Records Summary

A student can have multiple ISIR records for an award year. Using the ISIR Summary self-service page, you can view a list of all ISIR records for a student.

The ISIR Summary self-service page serves as a launching pad for other functionality. From this page, you can access other pages that provide functionality to view, modify, and compare ISIR records.

Prerequisites

ISIR records are imported.

Navigation

Financial Aid > ISIR Records > Manage ISIR Records > Manage ISIR Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Enter the person number, person name, or SSN. Click **Go**. Student records matching the query criteria are listed.
3. Select the Manage ISIR Records icon for the student. The icon is disabled if no ISIR records exist for the student in the selected award year.

The ISIR Summary self-service page lists all the ISIR records associated with the student.

9.3.2.4 Viewing ISIR Record Details

The Financial Aid subsystem stores the details of all the ISIR records associated with a student. From the ISIR Summary page, you can navigate to other self-service pages to view the ISIR details, such as FAFSA, CPS Processed Data, and NSLDS data.

Prerequisites

ISIR records are imported.

Navigation

Financial Aid > ISIR Records > Manage ISIR Records > Manage ISIR Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Enter the person number, person name, or SSN. Click **Go**. The student records matching the query criteria are listed.
3. Select the Manage ISIR Records icon for a student.

The ISIR Summary self-service page lists all the ISIR records associated with the student. Check marks highlight the Awarding and Payment ISIR records.

The ISIR records are identified by their *Transaction IDs*. The Transaction IDs are listed in ascending order. The Transaction ID for a record received from CPS is 13 characters long, for example *200100401ED01*. The first 9 digits of the Transaction ID represent the student's SSN. The next 2 characters represent the student's name ID. The last 2 digits represent the transaction number.

In case of internally-generated Correction ISIR records, the Transaction ID is 14 characters long because it is appended with the character *C*, for example *200100401ED01C*. There can be only one internally-generated Correction ISIR record for a student. The internally-generated Correction ISIR record is always set as the Awarding ISIR and used for awarding the students. For more information on how the Payment ISIR is set, refer to [Importing ISIR Records](#).

In case of Simulated ISIR records, the transaction number is replaced with the character *S* followed by a 2-digit transaction number, for example *200100401EDS01*. There can be more than one Simulated ISIR per student.

4. To view details of an ISIR record, select the Transaction ID for the record.

The View FAFSA Information self-service page displays student information, such as personal, dependency, income, and family details.

Note: You can modify an ISIR record while viewing the record by clicking **Modify** on the View FAFSA Information self-service page. For more information, refer to [Modifying ISIR Records](#).

5. To view details of family contribution, allowances, and CPS flags, select View Processed Data.
6. To view loan-related data, select View NSLDS Information.

9.3.2.5 Modifying ISIR Records

You can modify ISIR records for a student and recalculate student EFC. From the ISIR Summary self-service page, you can navigate to other self-service pages to modify ISIR records.

Prerequisites

ISIR records are imported.

Navigation

Financial Aid > ISIR Records > Manage ISIR Records > Manage ISIR Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
You cannot update information for an award year with **Legacy Details** or **Closed** status. Such award years are read-only.
2. Query a record. The student records matching the query criteria are listed.
3. Select the Manage ISIR Records icon for a student. The ISIR Summary self-service page is displayed.
4. Choose an ISIR record by selecting the radio button associated with the Transaction ID for the record.
5. Click **Modify**. The Modify ISIR Information self-service page is displayed.

You can manage verification items for a student, while modifying the ISIR record by clicking Manage Verification Items. For more information, refer to [Maintaining To Do and Verification Items](#).

Note: On the Modify ISIR Information self-service page, a non-updatable region called Student Verification Item(s) lists the student's verification items and their documentation values. This region does not list the waived verification items. If an ISIR field is listed as a verification item and has a documentation value, you cannot update that field in the Modify ISIR Information self-service page. The

documentation values for the verification items can only be updated in the Manage ISIR Verifications self-service page.

6. Make the required changes to the ISIR record.
7. Click **Recalculate Expected Family Contribution** to recalculate student EFC.

If you enter incorrect, incomplete, or inconsistent data in any field, an error message or warning is displayed. Else, the Review ISIR Modifications self-service page displays the initial ISIR record and the modified ISIR record with the recalculated EFC and updated data, if any.

8. Perform one of the following steps:
 1. Click **Save as Simulation ISIR**. The ISIR record is saved as a Simulated ISIR record. Simulated ISIR records are not used for processing.
 2. Click **Save as Correction ISIR**. The Save as Correction ISIR button is enabled only if there are no ISIR corrections pending with CPS (no correction items with **Batched** status) for the student and all verification items have associated documentation values.

Note: While creating a Correction ISIR record, you can save the ISIR record as a Simulated ISIR record, verify the student need details, and then save it as a Correction ISIR record.

When you click the Save as Correction ISIR button, the process validates all the ISIR fields for valid field definitions, including the verification items. If an internally-generated Correction ISIR does not exist, a new Correction ISIR record is created. If a Correction ISIR record exists, it is updated with the modified values and documentation values for the verification items, if they are different. For more information on the Create ISIR Corrections concurrent process, refer to [Running the Verification - Create ISIR Corrections Concurrent Process](#).

If you have created new correction items for the student, a message is displayed when you click the Save as Correction ISIR button. The message prompts you to place a hold on the new correction items. Correction items placed on hold are not sent to CPS when the Create ISIR Corrections concurrent process is run. This process considers only correction items with a status of **Ready**. Click **Yes** to place a hold on the new correction items. Click **No** to save the new correction items with a **Ready** status.

The ISIR Summary self-service page displays the modified ISIR record.

9.3.2.6 Comparing ISIR Records

You can monitor and compare ISIR records for a student.

Prerequisites

ISIR records are imported.

Navigation

Financial Aid > ISIR Records > Manage ISIR Records > Manage ISIR Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Query a record. The student records matching the query criteria are listed.
3. Select the Manage ISIR Records icon for a student. The ISIR Summary self-service page is displayed.
4. Choose an ISIR by selecting the radio button associated with the Transaction ID.
5. Click **Compare**. The Select ISIR to Compare self-service page is displayed.
6. Select the ISIR record with which you need to compare the previously selected ISIR record.
7. Click **Continue**. The View ISIR Comparisons self-service page displays both the ISIR records together.

You can modify an ISIR record while comparing two ISIR records by clicking Modify on the View ISIR Comparisons self-service page. For more information, refer to [Modifying ISIR Records](#).

9.3.3 Maintaining To Do and Verification Items

Managing To Do and verification items involves:

- [Assigning To Do Items](#)
- [Tracking To Do Items](#)
- [Assigning Verification Items](#)
- [Deleting Verification Items](#)
- [Managing Verification Items](#)

- [Sending the Missing Items Letter](#)

9.3.3.1 Assigning To Do Items

You can assign To Do items to a student either manually or by running the To Do Item concurrent process.

Prerequisites

Application Processing setup is complete.

Navigation

Financial Aid > Track To Do Items

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To assign a To Do item manually:

1. Query the appropriate record in the Track To Do Items window.
2. Select a code in the Item Code field. The date fields are populated.
3. Select a status in the Status field.
4. Save your work.

To assign a To Do item automatically:

1. Run the To Do Item concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the To Do Item concurrent process.

Table 9–2 To Do Item Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Group	Select the person ID group.
Person Number	Select the person number.

Table 9–2 (Cont.) To Do Item Parameters

Parameter	Description
Item Code 1	Select a To Do item from the list of values. This is a mandatory parameter.
Item Code 2	Select a To Do item from the list of values.
Item Code 3	Select a To Do item from the list of values.
Item Code 4	Select a To Do item from the list of values.
Item Code 5	Select a To Do item from the list of values.
Item Code 6	Select a To Do item from the list of values.
Item Code 7	Select a To Do item from the list of values.
Item Code 8	Select a To Do item from the list of values.
Item Code 9	Select a To Do item from the list of values.
Item Code 10	Select a To Do item from the list of values.
Item Code 11	Select a To Do item from the list of values.
Item Code 12	Select a To Do item from the list of values.
Item Code 13	Select a To Do item from the list of values.
Item Code 14	Select a To Do item from the list of values.
Item Code 15	Select a To Do item from the list of values.

9.3.3.2 Tracking To Do Items

You can view and monitor the To Do items assigned to a student by using the Track To Do Items window.

Prerequisites

Application Processing setup is complete.

Navigation

Financial Aid > Track To Do Items

Steps

1. Query a record. The student’s To Do list is displayed. You can perform multiple tasks in the Track To Do Items window.

2. Refer to the following table to perform the appropriate task.

The following table describes the various tasks you can perform to manage To Do items.

Table 9–3 Managing To Do items

To	Perform the Following Steps
View the current application status	Use the Application Process Status field. This field picks up the value from the student's financial aid base record. The application process status is calculated based on the current status of the Required for completion To do items for the student.
Update the status for an item	<ol style="list-style-type: none"> 1. Select the item. 2. Select a new status from the Status list of values. 3. Save your work.
Specify the reason for setting the status of an item code to Received	<ol style="list-style-type: none"> 1. Select the item. 2. Click Item Details. The Item Details window is displayed. 3. Enter data in the appropriate fields to specify the reasons. 4. Save your work. 5. Click Done to return to the Track To Do Items window.
Customize the correspondence text for a student	<ol style="list-style-type: none"> 1. Select the Correspondence Custom Text tab. 2. Select the Active check box. The text field is enabled. 3. Enter the text. 4. Save your work.
Specify or edit the maximum attempts for an item	<ol style="list-style-type: none"> 1. Select the item. 2. Enter a value in the Max Attempts text box. 3. Save your work.
Specify or edit the frequency for an item	<ol style="list-style-type: none"> 1. Select the item. 2. Enter a value in the Frequency text box. 3. Save your work.

Table 9–3 (Cont.) Managing To Do items

To	Perform the Following Steps
Set or remove an item as a prerequisite to complete application processing for the student	<ol style="list-style-type: none">1. Select the item.2. Select the Required for completion check box to set the item as a prerequisite.3. Alternatively, deselect the Required for completion check box to remove the item as a prerequisite.4. Save your work.
Verify if item details exist for the selected To Do item	<p>Check if the Item Details check box associated with the To Do item is selected. If yes, Item Details exist for the To Do item.</p> <p>The Item Details check box is read-only. It is automatically selected after you enter any data in the Item Details window.</p>
Set or remove an item as inactive	<ol style="list-style-type: none">1. Select the item.2. Select the Inactive check box for the item. If selected, the application ignores the To Do item during processing.3. Alternatively, deselect the Inactive check box to ensure that the application processes the To Do item.4. Save your work.

The values that you specify in the Correspondence Custom Text tab and Max Attempts, Frequency, and Required for Completion fields for an item override the values specified during setup.

9.3.3.3 Assigning Verification Items

When you assign a verification item to a student, the To Do items associated with the verification item are also assigned to the student. You can assign verification and To Do items to a student either manually or by running the Verification To Do Items concurrent process. The Verification To Do Items concurrent process assigns verification items to student based on the educational institution’s policy and information on the student ISIR record.

Prerequisites

Application Processing setup is complete.

Navigation

Financial Aid > ISIR Records > Manage ISIR Records > Manage ISIR Records self-service page

Requests > Concurrent Manager > Requests > Run > Single Request**Steps**

To assign a verification item manually:

1. Select the award year in the Switch Award Year list.
2. Query a record. The student records matching the query criteria are listed.
3. Select the Manage Verification Items icon for a student. The icon is disabled if no ISIR records exist for the student in the selected award year.

The Manage Verification Items self-service page lists the values of the verification items from the student Payment ISIR.
4. Click **Assign Verification Items**. The Assign Verification Items self-service page is displayed. You cannot assign verification items to a student if there are pending corrections at the CPS.
5. Click **Add Another Row**.
6. Click the search icon. The Search and Select: Verification Item self-service page is displayed.
7. Query the verification item. The results matching the search criteria are displayed.
8. Choose the verification item by selecting the radio button associated with the item.
9. Click **Select**. The Assign Verification Items self-service page is displayed.
10. Click **Assign**. The Manage Verification Items self-service page displays the assigned verification item.
11. Click **Save**.

To assign verification items automatically:

1. Run the Verification To Do Items Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Verification To Do Items Process concurrent process.

Table 9–4 Verification To Do Items Process Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Group	Select the person ID group.
Person Number	Select the person number.
ISIR Field	Select the ISIR field. This is a mandatory parameter.
Item Code 1	Select a To Do item from the list of values.
Item Code 2	Select a To Do item from the list of values.
Item Code 3	Select a To Do item from the list of values.
Item Code 4	Select a To Do item from the list of values.
Item Code 5	Select a To Do item from the list of values.
Item Code 6	Select a To Do item from the list of values.
Item Code 7	Select a To Do item from the list of values.
Item Code 8	Select a To Do item from the list of values.
Item Code 9	Select a To Do item from the list of values.
Item Code 10	Select a To Do item from the list of values.
Item Code 11	Select a To Do item from the list of values.
Item Code 12	Select a To Do item from the list of values.
Item Code 13	Select a To Do item from the list of values.
Item Code 14	Select a To Do item from the list of values.
Item Code 15	Select a To Do item from the list of values.

After you run this process, you can view the assigned verifications items on the Assign Verification Items and Manage Verification Items self-service pages. You can view the To Do items associated with the verification items on the Track To Do items window.

9.3.3.4 Deleting Verification Items

You can also delete verification items assigned to a student by using the Assign Verification Items self-service page.

Prerequisites

ISIR records are imported.

No documentation values exist for the verification items.

Navigation

Financial Aid > ISIR Records > Manage ISIR Records > Manage ISIR Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Query a record. The student records matching the query criteria are listed.
3. Select the Manage Verification Items icon for a student. The Manage Verification Items self-service page lists the verification items and their documentation values for the student.
4. Click **Assign Verification Items**. The Assign Verification Items self-service page is displayed.
5. To delete a verification item, select the Delete icon associated with the item. You can only delete verification items that do not have associated documentation values.

9.3.3.5 Managing Verification Items

To validate a verification item, you associate a documentation value with the verification item. Use the Manage Verification Items self-service page to validate verification items for a student.

Prerequisites

ISIR records are imported.

Navigation

Financial Aid > ISIR Records > Manage ISIR Records > Manage ISIR Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Query a record. The student records matching the query criteria are listed.
3. Select the Manage Verification Items icon for a student. The Manage Verification Items self-service page lists the verification items assigned to the student. In addition, the Payment ISIR value for each verification item is displayed.
4. Perform one of the following steps to specify a documentation value for a verification item:
 - Enter the value in the appropriate Documentation Value field. After you enter a documentation value, the page automatically calculates the difference in values. If there is a difference in the ISIR and Documentation values, the subsystem identifies the item as a correction item. You cannot create correction items for students with pending CPS corrections.
 - Select the Use Blank Value check box for a verification item to send a *blank* value as the Documentation Value.
5. To prevent the verification item from being sent to the CPS for processing, select the Waive check box for the verification item. After you select the Waive check box for a verification item, no validations are performed on the Documentation Value or Use Blank Value fields for that verification item.
6. Click **Save**.

9.3.3.6 Sending the Missing Items Letter

Run the Financial Aid - Missing Items Letter concurrent process to send letters to students informing them of pending To Do items. The process picks up the correspondence text based on the pending To Do items and sends the letter informing students about the tasks required to complete the application.

Before you run the Financial Aid - Missing Items Letter concurrent process for a student, check the status of the To Do items in the Track To Do Items window. Ensure that at least one To Do item assigned to the student meets the following criteria:

- The item has a status of **Requested**.
- The difference (in days) between the system date and the correspondence date for the item is greater than the value specified in the Frequency field.

- The number in the Count field for the item is less than the number in the Max Attempts field.

The letter sent to the student lists all the requested To Do items regardless of whether they meet the above criteria.

If required, you can also customize the correspondence text for a student. For more information on customizing correspondence text, refer to [Tracking To Do Items](#). After the process runs successfully for the student, the customized text is deleted. If required, you can enter a new message before sending the next letter.

Prerequisites

Setup for the subsystem is complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Financial Aid - Missing Items Letter concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Financial Aid - Missing Items Letter concurrent process.

Table 9–5 Financial Aid - Missing Items Letter Parameters

Parameter	Description
Document Name	Select a predefined letter format. This is a mandatory parameter.
Selection Criteria	Select the criteria for running the process. Choose S to run the process for a student or G to run it for a person ID group. This is a mandatory parameter.
Person ID Group	Select the person ID group.
Person Number	Select the person number.

Table 9–5 (Cont.) Financial Aid - Missing Items Letter Parameters

Parameter	Description
Delivery Type	Select the delivery method. The delivery methods available are: <ul style="list-style-type: none">■ E-MAIL■ E-MAIL/FAX■ E-MAIL/FAX/PRINT■ E-MAIL/PRINT■ FAX■ FAX/PRINT■ PRINT This is a mandatory parameter.
Printer Name	If the selected delivery type includes PRINT, specify the path and name of the printer.
Fax Number	If the selected delivery type includes FAX, specify the fax number of the student.
Award Year	Select the award year. This is a mandatory parameter.

9.3.4 Managing ISIR Corrections

After the correction items for a student are identified, the ISIR record is corrected and sent to CPS. CPS acknowledges the ISIR record and sends a Correction ISIR record to the educational institution. When you import the Correction ISIR, the import process updates the student’s verification process status on the financial aid base record.

The following table describes the available correction statuses for a correction item.

Table 9–6 Correction Statuses

Status	Indicates that
Ready	The correction record is ready for processing.
Batched	The correction record is sent to CPS.
Hold	Corrections are pending and the record must not to be batched.
Acknowledged	CPS has returned a new ISIR record for the correction record.

Managing ISIR Corrections involves:

- [Creating ISIR Corrections](#)
- [Viewing ISIR Corrections](#)
- [Sending ISIR Corrections](#)

9.3.4.1 Creating ISIR Corrections

You can create ISIR corrections in two ways. You can create ISIR corrections by:

- [Running the Verification - Create ISIR Corrections Concurrent Process](#)
- [Using the Modify ISIR Self-service Page](#)

Running the Verification - Create ISIR Corrections Concurrent Process

Run the Verification - Create ISIR Corrections concurrent process to create the Correction ISIR for students.

For each student, this process checks whether all verification items have documentation values on the Manage Verification Items self-service page. It processes only those student records whose verification items have associated documentation values. This process compares the documentation value against the Payment ISIR value for each verification item. If there is a discrepancy in the values, the process recalculates the student EFC and creates new correction items.

The process performs the following tasks if the student has a Payment ISIR and does not have an internally-generated Correction ISIR:

- Creates Correction ISIR
- Compares Correction ISIR values with Payment ISIR values
- Creates correction items with a status of **Ready**

The process performs the following tasks if the student has an existing internally-generated Correction ISIR:

- If the correction item already exists, the value of the correction item is overwritten if the received value is different and the correction status is **Hold** or **Ready**. The process does not update the correction status.
- If correction items do not exist, the process creates correction items with a correction status of **Ready**.

This process also updates the financial aid base record with the current status of the verification process for the student.

Prerequisites

Application Processing setup is complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Verification - Create ISIR Corrections concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. This process has a single parameter, Award Year, used to specify the award year. This is a mandatory parameter.

Using the Modify ISIR Self-service Page

To create the Correction ISIR and correction items, make any modification to the student ISIR record and click Save as Correction ISIR on the Review ISIR Modifications self-service page. For more information, refer to [Modifying ISIR Records](#).

9.3.4.2 Viewing ISIR Corrections

Use the ISIR Corrections window to view the ISIR corrections for students.

Prerequisites

Application Processing setup is complete.

Navigation

Financial Aid > ISIR Records > ISIR Corrections

Additional Notes

When you query a student record, the window displays the ISIR corrections for the student. You can view the information. You can also edit the correction status if the status is set to **Ready** or **Hold**.

9.3.4.3 Sending ISIR Corrections

After creating Correction ISIR records, you run the Create ISIR Corrections File concurrent process to collect details of the Correction ISIR records for students in

the specified award year. This process creates a file containing details of Correction ISIR records in the required format and sends the file to CPS.

This process checks the status of the correction items for each student and processes only the correction items with a correction status of **Ready**. It updates the status of the correction items from **Ready** to **Batched**. The process does not include student details in the file if the student has any correction items with **Hold**, **Acknowledged**, or **Batched** status.

You can view the log file to view the result of the concurrent process. For information on viewing log files, refer to [Concurrent Process Procedures](#).

Prerequisites

Application Processing setup is complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Create ISIR Corrections File concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Create ISIR Corrections File concurrent process.

Table 9–7 Create ISIR Corrections File Parameters

Parameter	Description
Award Year	Select the award year for which correction file is to be created. This is a mandatory parameter.
Person Number	Specify the person number.
Federal School Code	Select the school code. The school code is a six-digit number that uniquely identifies the financial aid office or school. The U.S. Department of Education assigns school codes to educational institutions participating in Title IV programs. This is a mandatory parameter.

Table 9–7 (Cont.) Create ISIR Corrections File Parameters

Parameter	Description
ETI Destination Number	Select the ETI Destination Number. This is a mandatory parameter while running the process for years 2002-03 and 2003-04. This parameter is not required for the year 2004-05.

9.3.5 Managing PROFILE Records

The Financial Aid subsystem allows you to manage and maintain multiple PROFILE records for students based on the award year. You can upload and import PROFILE records. In addition, you can view and compare the student's PROFILE data as it pertains to the PROFILE application and the Financial Need Analysis Report (FNAR).

The Financial Aid subsystem provides partial support for IM calculations. The Financial Aid subsystem provides functionality only to award funds against the EFC from the PROFILE record. You can calculate student IM-based EFC and award funds based on it only if the educational institution is integrated with the INAS, which is an IM-based need calculator maintained by the College Board. Currently, the Financial Aid subsystem is not integrated with INAS. If required, the educational institution can acquire INAS and integrate it with the Financial Aid subsystem.

Managing PROFILE records involves the following tasks:

- [Importing PROFILE Records](#)
- [Viewing PROFILE Records Summary](#)
- [Viewing PROFILE Details](#)
- [Modifying PROFILE Records](#)
- [Making a PROFILE Record the Awarding PROFILE Record](#)

9.3.5.1 Importing PROFILE Records

PROFILE records are imported in two stages: loading PROFILE records into temporary tables and importing data from the temporary tables into Oracle Student System. Run the CSS Profile Loader Process and CSS Profile Import Process concurrent processes to import the PROFILE records.

CSS Profile Loader Process

The CSS Profile Loader Process concurrent process loads the CSS-generated PROFILE flat files from an external location to the PROFILE temporary table in Oracle Student System.

Prerequisites

Record matching criteria are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the CSS Profile Loader Process concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. This process has a single parameter, Data File with Path. Enter the full path and name of the file to be imported as the value for the parameter. This is a mandatory parameter.

CSS Profile Import Process

The CSS Profile Import Process concurrent process picks up PROFILE data from the temporary table and uploads it into Oracle Student System. The CSS Profile Import Process concurrent process also performs the following tasks:

- Matches the PROFILE records to person records in Oracle Student System - The process searches for student information, such as SSN, first name, last name, date of birth, address, city, and zip code.
- Performs the following tasks for matched records:
 - Adds the PROFILE record to the student record
 - Creates or updates the financial aid base record
- Performs one of the following tasks for unmatched records based on the selected parameters:
 - Creates a person record (if the Create Person Record on No Match parameter is selected) and financial aid base record
 - Leaves the unmatched records in the temporary table

- Creates Admission Inquiry entries for:
 - Matched records if the Create Admission Inquiry parameter is set to **Yes**
 - Unmatched records if the Create Admission Inquiry and Create Person Record on No Match parameters are set to **Yes**
- Imports PROFILE records to the temporary table
- Sets the PROFILE record as the Awarding PROFILE record. In case of multiple records, the latest PROFILE record received from the College Board is set as the Awarding PROFILE record. To manually set a record as the Awarding PROFILE record, select the record and click the Use For Awarding button. However, the latest PROFILE record received from the College Board always supersedes the manually selected record.

When you run the CSS Profile Import process, a log file is generated. You can view the log file to check if all the data in the batch file was imported. For information on viewing log files, refer to [Concurrent Process Procedures](#).

The CSS Profile Import Process concurrent process when rerun, matches the remaining records in the temporary table assuming that new person records are created meanwhile.

Prerequisites

Application Processing setup is complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the CSS PROFILE Import Process concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the CSS PROFILE Import Process concurrent process.

Table 9–8 CSS PROFILE Import Process Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Create Person Record on No Match	Select Yes or No . Select Yes to automatically create person records and financial aid base records for unmatched records. Select No to manually review unmatched PROFILE records. This is a mandatory parameter.
Create Admission Inquiry	Select Yes or No . Select Yes to create admission inquiry records for matched records. If you select Yes and set the Create Person Record on No Match parameter to Yes , the process creates admission inquiry records for unmatched records. This is a mandatory parameter.
Admission Inquiry Method	Select the admission inquiry method. This field is enabled only if the Create Admission Inquiry parameter is set to Yes . The available admission inquiry methods are: <ul style="list-style-type: none"> ■ College fair ■ E-mail ■ Fax ■ Friend recommendation ■ Grandparents ■ High school guidance counselor ■ Institutional coach recruiting ■ Institutional mailing ■ Letter ■ Other source ■ Parents ■ Phone ■ Television advertisement ■ User ■ Voice Messages ■ Web

9.3.5.2 Viewing PROFILE Records Summary

A student can have multiple PROFILE records for an award year. Using the PROFILE Summary self-service page, you can view a list of all PROFILE records for a student.

Prerequisites

PROFILE records are imported.

Navigation

Financial Aid > PROFILE Records > Manage PROFILE Records > Manage PROFILE Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Enter the person number, person name, or SSN. Click **Go**. The records matching the query criteria are listed.
3. Select the View PROFILE Records icon for a student. The View PROFILE Records icon is disabled if a student does not have a PROFILE record for the selected award year.

The PROFILE Summary self-service page lists the PROFILE records for the student. A PROFILE record is identified by its *Internal ID*, which is 8 characters long, for example, *20000602*. The first 7 characters of the Internal ID represent the CSS ID Number, which is a unique ID assigned to the student by CSS. The last character of the Internal ID indicates the Record Type. After you modify a PROFILE record, the last character of the Internal ID is set to M, for example *2000060M*.

9.3.5.3 Viewing PROFILE Details

From the PROFILE Summary page, you can navigate to other self-service pages to view the PROFILE and the FNAR details for a student. You can view PROFILE details, such as student, parent, school, and other information. You can view the following FNAR details for a student:

- Identification information
- Student need analysis
- Parent need analysis
- Budgets and estimates

- Messages and computations

Prerequisites

PROFILE records are imported.

Navigation

Financial Aid > PROFILE Records > Manage PROFILE Records > Manage PROFILE Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Enter the person number, person name, or SSN. Click **Go**. The records matching the query criteria are listed.
3. Select the View PROFILE Records icon to view the PROFILE records for a student. The PROFILE Summary self-service page is displayed.
4. Click the Internal ID for a PROFILE record to view its details. The View PROFILE - Student Information self-service page displays student details, such as income, assets, and expenses information.
5. Select a link to view the appropriate details.

9.3.5.4 Modifying PROFILE Records

You modify PROFILE records to recalculate the student EFC by performing the following two tasks:

- [Editing PROFILE Records](#)
- [Recalculating EFC by Using INAS](#)

You can recalculate student IM-based EFC only if the educational institution is integrated with INAS.

Editing PROFILE Records

You can navigate to other self-service pages from the PROFILE Summary self-service page to edit the PROFILE record.

Prerequisites

PROFILE records are imported.

Navigation

Financial Aid > PROFILE Records > Manage PROFILE Records > Manage PROFILE Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Enter the person number, person name, or SSN. Click **Go**. The records matching the query criteria are listed.
3. Select the View PROFILE Records icon to view the PROFILE records for a student. The PROFILE Summary self-service page is displayed.
4. Choose a PROFILE record by selecting the radio button associated with the record. You can only create one modified PROFILE record for a student. If required, you can update an existing modified PROFILE record.
5. Click **Modify**. The Modify PROFILE Record: Student Information self-service page is displayed.
6. Modify the student, parent, and other information. Click **Finish**. The Review Modifications and Save self-service page lists the modified fields and associated values.
7. Review your changes. Click **Save** to save the changes.

Recalculating EFC by Using INAS

Run the CSS PROFILE INAS EFC Calculation Process concurrent process to make the student PROFILE data available to INAS. This process also updates the financial aid base record with the EFC value. You can view the EFC in the Summary tab of the Financial Aid Base Record window.

Note: Student PROFILE EFC is available only if Oracle Student System is integrated with INAS. Without the integration, you cannot determine student EFC or award funds based on IM methodology.

Prerequisites

PROFILE records are imported.

Profile option IGF:INAS Integrated is set to **Yes**.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the CSS PROFILE INAS EFC Calculation Process concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To update the EFC values for all students in an award year, do not specify any values for the Person Group or Person Number parameters.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the CSS PROFILE INAS EFC Calculation Process concurrent process.

Table 9–9 CSS PROFILE INAS EFC Calculation Process Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Select the person number.
Person Group	Select the person ID group.

9.3.5.5 Making a PROFILE Record the Awarding PROFILE Record

Students are awarded funds based on their Awarding PROFILE record. You can set an existing PROFILE record as the Awarding PROFILE record. Modified PROFILE records can be made Awarding only when the following PROFILE FNAR sections are populated:

- File Receipt Date
- Dependency Status
- Institutional Methodology Parent Contribution
- Institutional Methodology Student Contribution
- Estimated Federal Methodology Parent Contribution
- Estimated Federal Methodology Student Contribution.

Prerequisites

PROFILE records are imported.

Navigation

Financial Aid > PROFILE Records > Manage PROFILE Records > Manage PROFILE Records self-service page

Steps

1. Select the award year in the Switch Award Year list.
2. Enter the person number, person name, or SSN. Click **Go**. The records matching the query criteria are listed.
3. Select the View PROFILE Records icon for a student. The PROFILE Summary self-service page is displayed.
4. Choose a PROFILE record by selecting the radio button associated with the Internal ID.
5. Click **Use for Awarding** to set the selected record as the Awarding PROFILE record. The PROFILE Summary self-service page displays the new Awarding PROFILE record.

9.3.6 Reviewing Unmatched ISIR and PROFILE Records

The ISIR and PROFILE import processes import records based on the matching criteria specified during setup. During the import process, the records that partially or do not match the specified criteria are not imported. You need to manually review and evaluate the unmatched records.

You can perform the following tasks for unmatched records:

- Match the records to existing person records in Oracle Student System and create or update the corresponding financial aid base records
- Create a person record in Oracle Student System and financial aid base record in the Financial Aid subsystem

Use the Review Unmatched Records window to view the unmatched records.

Prerequisites

ISIR and PROFILE records are imported.

Navigation

Financial Aid > Financial Aid Data Receipt > Review Unmatched Records

Steps

1. Select the award year.
2. Select the record type. The unmatched records are displayed in the window.
3. Select a record.
4. Click **View Matches**. The Possible Record Matches window displays the matching Oracle Student System person records.
5. If you find an approximate match, perform the following steps:
 1. Select the record.
 2. Select the Force Record Creation check box associated with the record.
 3. Click **Add Record** to create or update the financial aid base record.
6. If you do not find a match, click **Create Person** to create a person and financial aid base record.
7. Save your work.

9.3.7 Maintaining Financial Aid Base Records

When student data is received, you create financial aid base records. Financial aid base records allow you to monitor and track a student's financial aid, admissions, needs analysis, awards, and enrollment information throughout the award year. A student can have only one base record for an award year.

At any point, the financial aid base record for a student provides information on the current status of aid processing for the student. Whenever additional information is received for a student, the base record is updated for the student.

Maintaining financial aid base records involves:

- [Creating Financial Aid Base Records](#)
- [Viewing and Updating Student Details](#)
- [Overriding NSLDS Default Status](#)
- [Managing Financial Aid Notes](#)
- [Updating the ISIR Status](#)

9.3.7.1 Creating Financial Aid Base Records

You can create financial aid base records either automatically by running the Base Record - Create Financial Aid Base Record concurrent process or manually.

Note: The Financial Aid subsystem automatically creates financial aid base records if you set the Create Person Record on No Match parameter to **Yes** while importing ISIR and PROFILE records. For more information, refer to [Importing ISIR Records](#) and [Importing PROFILE Records](#).

Prerequisites

Person record exists for the student in Oracle Student System.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Financial Aid > Financial Aid Base Record

Steps

To create financial aid base records automatically:

1. Run the Base Record - Create Financial Aid Base Record concurrent process. This process collects person information from Oracle Student System and creates corresponding records in Financial Aid.

For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can select the students by using the Person Number or Person Group parameters. Although these parameters are optional, you must specify a parameter before running the process.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the Base Record - Create Financial Aid Base Record concurrent process.

Table 9–10 Base Record - Create Financial Aid Base Record Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Select the person number.

Table 9–10 (Cont.) Base Record - Create Financial Aid Base Record Parameters

Parameter	Description
Person Group	Select the person ID group.

To create financial aid base records manually:

1. Query a record in the Financial Aid Base Record window.
2. Select **File > New**.
3. Enter the student details.
4. Save your work.

You can create a financial aid base record manually only for students with existing person records in Oracle Student System.

9.3.7.2 Viewing and Updating Student Details

Using the Financial Aid Base Record window, you can view the following student details:

- Holds assigned to the student
- Person details
- Admission-related information
- ISIR record details
- PROFILE record details
- Award Letter Correspondence information
- Award details
- Loan details
- COA information
- Student Academic Progress information

Prerequisites

Financial aid base record exists.

Navigation

Financial Aid > Financial Aid Base Record

Steps

- 1. Query a record. The student details are displayed. You can perform multiple tasks in the Financial Aid Base Record window.
- 2. Refer to the following table to perform the appropriate task.

The following table describes the tasks you can perform to manage student details.

Table 9–11 Managing Student Details

To	Perform the Following Steps
Manage holds for a student	<ul style="list-style-type: none">1. Click Person Holds. The Person Hold Details window is displayed. For more information on the Person Hold Details window, refer to Viewing Person Hold Details in Person.2. View the holds assigned to the student.3. If required, assign holds to the student.4. Close the window.
View person details	<ul style="list-style-type: none">1. Click Person Details. The Person Details window is displayed. For more information on the Person Details window, refer to Creating Person Details in Person.2. View the person information for the student. You cannot update the person information in this window.3. Close the window.
View admission details	<ul style="list-style-type: none">1. Select the Admissions tab. If a single admission application exists for the student, the Admissions tab displays the student admission details. If multiple admission applications exist for the student, the Multiple Application Instances check box is selected.2. Click Admission Details if multiple admission applications exist for the student. The Direct Admission window displays the admission details. For more information on the Direct Admission window, refer to Entering Applications in Admissions.3. View the admission information. You cannot update the admission information.4. Close the window.

Table 9–11 (Cont.) Managing Student Details

To	Perform the Following Steps
Manage ISIR records	<ol style="list-style-type: none"> 1. In the Need Analysis tab, click ISIR Summary. The ISIR Summary page is displayed. 2. View the ISIR records summary. For more information on viewing and updating ISIR records, refer to Managing ISIR Records. 3. Close the window.
Manage PROFILE records	<ol style="list-style-type: none"> 1. In the Need Analysis tab, click Profile Detail. The PROFILE Summary page is displayed. 2. View the PROFILE records summary. For more information on viewing and updating PROFILE records, refer to Managing PROFILE Records. 3. Close the window.
View award letter correspondence information	<ol style="list-style-type: none"> 1. In the Awards tab, click Correspondence History. The Correspondence Interaction History window is displayed. For more information on the Correspondence Interaction History window, refer to Viewing Correspondence Interaction History in Correspondence. 2. View the interaction details or resend a letter. You cannot update existing correspondence information. 3. Close the window.
View award details	<ol style="list-style-type: none"> 1. In the Awards tab, click Award Detail. The Student Awards window is displayed. 2. View the award details. You cannot update award details from this window. 3. To update award details, navigate directly to the Student Awards window. For more information, refer to Viewing and Updating Student Award Details. 4. Close the window.
View loan details	<ol style="list-style-type: none"> 1. In the Awards tab, click Loan Detail. The Loan Details window is displayed. For more information on the Loan Details window, refer to Processing Student Loans. 2. View loan details for the student. 3. To update loan details, navigate directly to the Student Awards window. For more information, refer to Viewing and Updating Student Award Details. 4. Close the window.

Table 9–11 (Cont.) Managing Student Details

To	Perform the Following Steps
Manage COA details	<ol style="list-style-type: none">1. In the Awards tab, click Cost of Attendance. The Student Cost Of Attendance By Item window is displayed.2. View or update student COA details. For more information, refer to Managing Cost of Attendance.3. Close the window.
View student academic progress information	<ol style="list-style-type: none">1. In the Enrollment tab, click Academic Progress Details. The Student Progression Rule Check window is displayed. For more information on the Student Progression Rule Check window, refer to Manually Applying Outcomes in Academic Records.2. View the student progress details. You cannot update student progress details.3. Close the window.

9.3.7.3 Overriding NSLDS Default Status

You can use your discretion and override the NSLDS default status for students.

Prerequisites

Financial aid base records exist for the students.

Navigation

Financial Aid > Financial Aid Base Record window > Need Analysis

Additional Notes

Institutions receive students’ NSLDS default status from CPS. If the student is a defaulter, the NSLDS Defaulted Loan Flag field on the student’s ISIR record is set to **Y**.

The student’s NSLDS default status is checked before Direct and FFELP loans are originated. Loan records are not originated for defaulting students.

At any time, institutions can override the NSLDS default status based on more up-to-date information than the NSLDS database. To override student NSLDS data, select the Override NSLDS Default check box.

9.3.7.4 Managing Financial Aid Notes

You can attach notes to a student at the award year or person level.

Prerequisites

Financial aid base record exists for the student.

Navigation

Financial Aid > Financial Aid Base Record

Steps

1. Query for the appropriate record.
2. Click **Financial Aid Notes**. The Financial Aid Notes window is displayed.
3. Select a person note type from the Person Note Type field.
4. Enter a description in the Short Description field.
5. Select **File > Save**.
6. Click **Note**. The Text Notes window is displayed.
7. Enter the note details.
8. Save your work.

9.3.7.5 Updating the ISIR Status

Run the Verification - Update Verification Status concurrent process to update the verification status of ISIR records in the financial aid base records. This process picks up the records for a given award year and person ID group and updates the status of the records to the specified status.

Prerequisites

The setup for the subsystem is complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Verification - Update Verification Status concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Verification - Update Verification Status concurrent process.

Table 9–12 Verification - Update Verification Status Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Group	Select the person ID group. This is a mandatory parameter.
From Verification Status	Select the verification status to modify. You can choose from Manually Set to Waived , Selected Not Verified , Selected for Verification , or Without Documentation . This is a mandatory parameter.
To Verification Status	Select the new verification status. This is a mandatory parameter.

9.3.8 Maintaining Institutional Applications

Educational institutions define application completeness requirements for different categories of students. Student applications are checked for completeness to determine if sufficient data exists. If student data is insufficient, you define institutional application questions to obtain information from students. Students then answer the questions to provide the required information.

Prerequisites

Financial aid base record exists for students.

Navigation

Financial Aid > Institutional Application

Additional Notes

When you query a record, the fields in the Institutional Application window are populated. You can view the answers to obtain student information. You can also update or enter the answers when student information is received.

For more information on setting up institutional application questions, see the *Oracle Student System Implementation and Administration Guide*.

9.4 Processing Awards

9.4.1 Overview

Processing awards allows you to determine how the available funds are distributed among students. Processing awards involves the following:

- [Managing Cost of Attendance](#)
- [Performing Preawarding Tasks](#)
- [Administering Awards](#)
- [Performing Post-awarding Tasks](#)

Students are awarded financial aid based on their need, which is the difference between the student COA and EFC. Student EFC is obtained from the student ISIR or PROFILE record depending on the methodology used. Student COA is an estimate of a student's education expenses for the enrollment period. For most funds, you need to determine the student COA before awarding aid. For more information on determining and managing student COA, refer to [Managing Cost of Attendance](#).

Before awarding funds to students, you can perform various tasks, such as assigning students to award groups. For more information, refer to [Performing Preawarding Tasks](#).

Administering awards may involve awarding funds to eligible students both manually and automatically. The process of automatically awarding funds is also known as *packaging*. For more information, refer to [Administering Awards](#).

After awarding is complete, you can perform various tasks, such as viewing student award details and generating award notification letters. For more information, refer to [Performing Post-awarding Tasks](#).

9.4.2 Managing Cost of Attendance

Student COA consists of many items, such as tuition, boarding, books, supplies, travel, and personal expenses. During setup, COA items are identified and costs are assigned to the items. Then, COA items are grouped and distributed across terms to create COA groups. For information on setting up COA items and groups, see the *Oracle Student System Implementation and Administration Guide*.

Using COA groups, you assign COA items to students by using an automated process. You determine COA for a student based on the educational institution's policies. Managing COA involves:

- [Assigning COA Items](#)
- [Viewing Student COA Details](#)
- [Modifying Student COA Details](#)

9.4.2.1 Assigning COA Items

Student COA is determined by assigning COA items to the student. You can either assign COA items to a student manually or automatically.

Prerequisites

COA items and groups are defined.

Navigation

Financial Aid > Student Cost of Attendance By Item

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To assign a COA item manually:

1. Query a record. The window displays student COA details.
2. Select a row in the Items region.
3. Click **File > New**. A new row is added.
4. Select an item from the Item Code list of values.
5. If you enter the first COA item manually, click **Modify Terms** and specify the terms. For more information, refer to [Modifying Student COA Details](#).
6. Save your work.
7. Specify the term-wise amount for the item in the Terms region.
8. Optionally, enter the Pell Grant amount in the Pell Amount field if the student is eligible for Pell Grant.
9. Optionally, specify the alternate expenses in the Alternate Pell Amount field if the student is a privileged student.

10. Optionally, select the Fixed check box to indicate that the cost is fixed.

Note: The Awards - Award Students concurrent process only considers fixed COA items while awarding if the Award using Fixed Cost of Attendance Items only check box is selected for the award group during setup. For more information on setting up award groups, see the *Oracle Student System Implementation and Administration Guide*.

11. Save your work.

To assign COA items automatically:

1. Run the Awards - Cost of Attendance Item Assignment concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. The COA items and attributes are assigned or updated for students based on the selected COA group.

3. To set the parameters, refer to the following table.

The following table describes the parameters for the Awards - Cost of Attendance Item Assignment concurrent process.

Table 9–13 Awards - Cost of Attendance Item Assignment Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Group Code	Select the COA group. This is a mandatory parameter.
Update Cost of Attendance	Select Y or N . Choose Y to update the COA items based on the COA group setup. This is a mandatory parameter.
Cost of Attendance Update Method	Select the update method from the list of values. Choose Overwrite Person's COA if terms are inconsistent to replace the student COA if the student's COA terms do not match the selected COA group's terms. Select Skip Person if terms are inconsistent to ignore students for whom the student's COA terms do not match the selected COA group's terms.

Table 9–13 (Cont.) Awards - Cost of Attendance Item Assignment Parameters

Parameter	Description
Person Selection	Specify the selection method. You can set the value to P , S , or Y . Choose P to run the process for all students in the specified person group. Choose S to run the process for a single student. Choose Y to run the process for all students in an award year. This is a mandatory parameter.
Person Group	Select the person ID group.
Person Number	Select the person number.

The process adds messages to the log file detailing the changes and replacements, if any. In addition, the log file contains warning messages for overawarded students. For more information, refer to [Concurrent Process Procedures](#).

9.4.2.2 Viewing Student COA Details

COA items are grouped and distributed across terms. Thus, depending on the student program, COA can vary across terms. You can view student COA information sorted by the COA items or terms.

Navigation

Financial Aid > Student Cost of Attendance By Item

Financial Aid > Student Cost of Attendance By Term

Additional Notes

Query a record in the Student Cost of Attendance By Item window to view student COA sorted by COA items.

Query a record in the Student Cost of Attendance By Term window to view term-based COA details for the student.

9.4.2.3 Modifying Student COA Details

You can modify student COA data by using the Student Cost of Attendance By Item window. Modifying student COA involves:

- [Deleting COA Items](#)
- [Modifying COA Amount](#)

■ [Modifying COA Terms](#)

When student COA is modified, student need is recalculated and updated in the financial aid base record. The awarding process takes into account the modified need value.

Prerequisites

Students are assigned COA.

Navigation

Financial Aid > Student Cost of Attendance By Item

Deleting COA Items

To delete a COA item:

1. Query a record. The window displays student COA details.
2. Select a row in the Items region.
3. Select **Edit > Delete**. The Caution message box prompts you to confirm the deletion.
4. Click **OK**. The selected COA item is deleted.
5. Save your work.

Modifying COA Amount

To modify the COA amount for an item:

1. Query a record to view student COA details.
2. Select the COA item in the Item Code field.
3. Modify the amount for the item in the Terms region.
4. Save your work.

Modifying COA Terms

All COA items for a student are associated with the same terms. If you change the terms associated with a COA item, the terms for all the COA items are modified. To modify COA terms:

1. Query a record. The window displays student COA details.
2. Select a COA item.

3. Click **Modify Terms**. The Modify Terms window is displayed.
4. To add a term for the item:
 1. Select **Add**.
 2. Select the term from the Term list of values.
 3. Click **OK**.
5. To delete a term for the item:
 1. Select **Delete**.
 2. Select the term from the Term list of values.
 3. Click **OK**.
6. Save your work.

9.4.3 Performing Preawarding Tasks

Preawarding tasks include:

- [Assigning Students to Award Groups](#)
- [Viewing Need Details](#)

9.4.3.1 Assigning Students to Award Groups

During setup, you create award groups to define the available funds, limits for each fund, and sequence in which funds are awarded during packaging. For information on setting up award groups, see the *Oracle Student System Implementation and Administration Guide*.

You can assign students to award groups manually or automatically. Award groups must be assigned prior to running the Awards - Award Students concurrent process.

Prerequisites

Student financial aid base records exist.

Award groups are defined.

Navigation

Financial Aid > Financial Aid Base Record

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To assign an award group to a student manually:

1. Query a record to view student details.
2. Select the Awards tab.
3. Select the award group from the Award Group list of values.
4. Save your work.

To assign an award group to a student automatically:

1. Run the Awards - Assign Award Groups concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. You can run the process for a group of students or for all students in the selected award year. Specify a value for the Person Group parameter to run the process for a group of students. If you do not specify a value for the Person Group parameter, the process considers all students in the selected award year.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the Awards - Assign Award Groups concurrent process.

Table 9–14 Awards - Assign Award Groups Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Group Code	Select the award group to which students are assigned. This is a mandatory parameter.
Person Group	Select the person ID group.

9.4.3.2 Viewing Need Details

You can view a summary of student need details in the Financial Aid Base Record window. You can view additional student need details based on the imported ISIR records on the View Need Details self-service page.

Prerequisites

ISIR records are imported.

PROFILE records are imported.

Students are assigned COA.

Navigation

Financial Aid > Financial Aid Base Record

Financial Aid > ISIR Records > Manage ISIR Records > Manage ISIR Records self-service page

Steps

To view a summary of need details:

1. Query a record in the Financial Aid Base Record window. The student details are displayed.
2. Select the Need Analysis tab to view student need details. You can also view the need information based on the imported ISIR on the Summary tab.

To view need details based on the imported ISIR records:

1. Select the award year in the Switch Award Year list.
2. Enter the person number, person name, or SSN in the Student Search region.
3. Click **Go**. The student records matching the query criteria are listed.
4. Select the Manage ISIR Records icon for the student. The ISIR Summary self-service page lists all the ISIR records associated with the student.
5. Choose an ISIR record by selecting the appropriate radio button.
6. Click **View Need Details**. The View Need Details self-service page displays student need details based on the selected ISIR record. By default, the page displays the student need details based on accumulative total values across terms.

Note: The View Need Details button is disabled if the student is not assigned COA.

7. To view need details sorted by term-based total values, select **Term Totals** from the View list of values.

9.4.4 Administering Awards

Administering awards involves awarding funds to students, either automatically or manually. Administering awards involves the following tasks:

- [Importing External Awards](#)
- [Awarding Multiple Funds](#)
- [Awarding a Single Fund](#)
- [Awarding Funds Manually](#)

You can import external awards into Oracle Student System. For more information, refer to [Importing External Awards](#).

You can award either multiple funds or a single fund. For information on automatically awarding multiple funds based on the defined award group policies and limits, refer to [Awarding Multiple Funds](#). For information on automatically awarding a single fund, refer to [Awarding a Single Fund](#).

You can manually award funds to an individual student or a group of students. For information on awarding funds manually, refer to [Awarding Funds Manually](#).

9.4.4.1 Importing External Awards

Consider a scenario in which a student transfers to your educational institution. In such a case, you may need to import existing student award data into Oracle Student System by running the Awards - Import External Awards concurrent process. Along with award details, this process imports planned disbursement data. The process does not import actual disbursement data.

Before you run the process, ensure that the following two tasks are complete:

- The interface tables are populated with the external awards data. For more information, refer to the Legacy - Award and Disbursement Data Import Process section of the *Oracle Student System Open Interfaces User's Guide*.
- The external terms specified in the flat file are mapped to Oracle Student System terms. During setup, you specify the mapping in the External Term Mapping window. For more information, see the *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Funds are created and defined.

Interface tables are populated with the external award data.

External terms are mapped to Oracle Student System terms.

Setup for the Financial Aid subsystem is complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Awards - Import External Awards concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. To set the parameters, refer to the following table.

The following table describes the parameters for the Awards - Import External Awards concurrent process.

Table 9–15 Awards - Import External Awards Concurrent Process

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Batch ID	Select the batch. This is a mandatory parameter.
Delete	Select Yes or No . If you select Yes , rows that are successfully imported into Oracle Student System are deleted from the interface tables. This is a mandatory parameter.

9.4.4.2 Awarding Multiple Funds

You run the Awards - Award Students concurrent process to automatically award multiple funds to students. You award funds to students based on the fund attributes defined in the Fund Manager and Award Groups windows during setup.

The following table describes how awarding differs based on the specified parameters.

Table 9–16 Using the Awards - Award Students Concurrent Process

To Award Funds to	Specify Values for the Following Parameters
<p>All students in an award year based on the limits and attributes defined for the:</p> <ul style="list-style-type: none"> ■ Award group in the Award Groups window ■ Funds in the Fund Manager window 	<ul style="list-style-type: none"> ■ Award Year
<p>All students in an award group based on the limits and attributes defined for the:</p> <ul style="list-style-type: none"> ■ Award group in the Award Groups window ■ Funds in the Fund Manager window 	<ul style="list-style-type: none"> ■ Award Year ■ Group Code
<p>A student in an award year based on the limits and attributes defined for the:</p> <ul style="list-style-type: none"> ■ Award group in the Award Groups window ■ Funds in the Fund Manager window 	<ul style="list-style-type: none"> ■ Award Year ■ Person Number
<p>When you run the process for a single student, the process retrieves the award group for the specified student and applies the limits and attributes associated with the award group.</p>	

This process searches for the Awarding ISIR for each student. If the Awarding ISIR does not exist for a student, the process skips the student and adds a message to the log file.

If the fund is a federal loan, such as a Subsidized or Unsubsidized Direct Loan, Subsidized or Unsubsidized Federal Loan, the process checks the Stafford loan limits before awarding. If the Stafford loan limits are not defined, the process does not award any federal loans to students. To determine the Stafford loan limits for the current term, the process uses the class standing of the student. If the award is for a future term, the process uses predictive class standing of the student. For more information on class standing, see *Oracle Student System Implementation and Administration Guide*.

While awarding non-federal funds, this process performs the following tasks:

1. Checks the EFC value. Non-federal funds can use either IM or FM methodology. You can award funds based on IM methodology only if Oracle Student System is integrated with INAS.
- Checks for the PROFILE EFC value for funds using IM methodology.

- Checks for the ISIR EFC value for funds using FM methodology.
If no value is found, the process skips the student and logs an error message.
- 2. Considers both FM-based and IM-based need for a student.
- 3. Uses the lower of the FM-based and IM-based need to award funds.

Oracle Student System supports Formulas 1, 2, and 3 to calculate Pell Grant for students. For each eligible student, the process determines the Pell Formula based on student data, such as attendance type, EFC, and COA, and calculates the Pell amount. The process determines the Pell amount based on student data by using the Pell schedule, which is defined by the U.S. Department of Education. You enter the Pell schedule for an award year during setup. For more information, see the *Oracle Student System Implementation and Administration Guide*.

If the student is overawarded after awarding Pell Grant, the process displays a message prompting you to adjust the student funds manually.

While awarding FFELP or Alternative loans, the process determines the disbursement fees based on the lender and corresponding fees defined during setup.

Validations

During packaging, the student need changes after each award is made. This process keeps a running calculation for each student while awards are packaged.

While awarding funds, this process checks whether the student meets the required conditions to receive the fund. In addition, the process checks if any holds are associated with the student. There are two types of holds: holds on all funds and holds on specific funds. Based on the hold type, the process excludes specific funds or all funds for the student and proceeds with the next student.

While awarding funds, the process performs the following validations:

- Checks if any funds are available for awarding or not.
- Checks if the student is already awarded a particular fund. A fund that is already awarded to a student is never repackaged for the student. The process skips awarded funds for a student.
- Checks for exclusive and contingent funds with respect to each fund before awarding the fund. You can specify exclusive and contingent funds for a fund in the Fund Manager window during setup. For more information, see the *Oracle Student System Implementation and Administration Guide*.

- Checks the awarded amount against the defined award limits for all funds. The process checks the awarded amount against the minimum and maximum award amounts, maximum yearly amount, and maximum life time amount defined for the fund during setup.
- Checks the student EFC and need before awarding all funds. The EFC and need are determined based on the EFC methodology associated with the fund during setup. If no student need exists, the process checks whether the fund is an entitlement.
 - If the fund is specified as an entitlement in the Fund Manager window during setup, the process awards the fund regardless of the student need.
 - If the fund is not an entitlement fund, the process checks whether the fund can replace the family contribution (specified in the Fund Manager window during setup). If the fund can replace the family contribution, the fund is awarded based on the remaining family contribution.
- Checks whether the awarded fund exceeds the maximum number of times the fund can be awarded.
- If awarding an entitlement fund results in overaward to the student, then an overaward hold is placed on the disbursements of the award. The process always uses FM-based need to calculate overawards. Typically, a student is overawarded if an entitlement fund is placed at the bottom of the fund stack.
- While awarding a fund, the process checks for the To Do items associated with a fund and the current To Do items assigned to the student. The process assigns only the To Do items that are not currently assigned to the student.
- The process performs the following checks while awarding Pell Grant:
 - Checks for and uses the Pell COA.
 - Checks for and uses the Primary EFC from the student ISIR record.
 - Awards Pell Grant only for the terms common between the selected distribution plan and student COA.
 - Checks for the Pell eligibility flag on the student ISIR record.
 - Validates if the Awarding ISIR record for the student is set as the Payment ISIR record.

Prerequisites

COA is assigned to students.

Before awarding Pell Grant, ensure that Pell Grant setup is complete.

Fund attributes are defined in the Fund Manager window.

Award groups are defined.

Load calendars and term installments for funds are set up.

Students are assigned to award groups.

Students have Awarding ISIR and an Awarding PROFILE record if awarding IM funds.

Students are not assigned awarding holds.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Awards - Award Students concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can run this process in either actual or simulation mode. Run the process in simulation mode to get an idea of how the awarding would happen in the actual mode. When run in simulation mode, the awarding is subject to the same set of validations, as when run in actual mode. However, in simulation mode, the process creates read-only awards with **Simulated** status. The subsystem does not use simulated awards to determine the student resources or disburse funds.
3. You cannot select both the Group Code and the Person Number parameters. You can select either.
4. If you specify a value for the Group Code parameter, the process uses the distribution plan associated with the award group to award all funds. However, if the distribution plan is overridden for a specific fund in the selected award group, the process uses the fund-level distribution plan to award the fund.
5. When you specify the Person Number parameter, the process applies the limits and attributes defined for the award group in the Award Groups window and the funds in the Fund Manager window. The process retrieves the award group for the specified student from the financial aid base record and applies the limits and attributes associated with the award group.

6. To set the parameters, refer to the following table.

The following table describes the parameters for the Awards - Award Students concurrent process.

Table 9–17 Awards - Award Students Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Group Code	Specify the award group. If specified, the award is packaged only for students of the selected award group.
Person Number	Select the person number.
Run in Simulation Mode	Select Yes or No . Choose Yes to run the process in simulation mode. Simulated awards are automatically deleted when actual awards are created. Choose No to run the process in the actual mode. You can run this process only once for a student in the actual mode. This is a mandatory parameter.
Send Award Notification	Select Yes or No . If you select Yes , the process sets the award notification status on the financial aid base record to Ready to Submit . When run, the Financial Aid - Award Notification Letter concurrent process uses this status to identify the students for whom the award notification letters are to be generated. This is a mandatory parameter.
Request Log Mode	Specify the level of detail for the log file. Choose either Detail Mode or Summary Mode . This is a mandatory parameter.

9.4.4.3 Awarding a Single Fund

Run the Awards - Award a Single Fund concurrent process to package awards to students from a single fund.

This process can award funds based on both FM-based and IM-based needs. The process uses IM-based need to award the fund in the following situations:

- If the FM-based need is higher than the IM-based need

- If a student does not have an Awarding ISIR record when awarding an IM fund

If the Always use Lower of Institutional or Federal Need profile option is set to **No**, the process uses IM-based need to award even if the FM-based need is lower than the IM-based need, student has an Awarding ISIR, and student does not have any existing FM-based awards.

The tasks performed by this process depend on the specified fund. To award federal funds, this process checks the student COA and uses EFC from the Awarding ISIR records. Thus, you can award federal funds only to students with COA and Awarding ISIR records. The one exception to this is the federal PLUS loan. You can award federal PLUS loans to students without Awarding ISIR records.

Awarding non-federal FM funds requires students to have Awarding ISIR records. If the fund is IM-based, an Awarding PROFILE record is required. If the requirements are not met, the process errors out. However, if you specify a value for the Allow to Exceed parameter, neither the Awarding ISIR or PROFILE are required.

While packaging FFELP or Alternative loans, the process determines the disbursement fees based on the lender and corresponding fees defined during setup.

This process performs the same validations that the Awards - Award Students concurrent process performs. For more information on the validations performed, refer to [Validations](#).

Prerequisites

Refer to [Prerequisites](#) for [Awarding Multiple Funds](#).

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Awards - Award a Single Fund concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. You can select the students by using the Person Number or Person Group parameters. Although these parameters are optional, you must specify a parameter before running the process.

3. By using the Allow to Exceed parameter, you can award non-federal funds to students without Awarding ISIR records. If you do not specify a value for the Allow to Exceed parameter, the process awards the fund based on the Awarding ISIR or PROFILE records. If the Allow to Exceed parameter is set to COA, student COA and EFC (from the ISIR or PROFILE) are not required.

Do not specify a value for the Allow to Exceed parameter while awarding a federal fund or a federal entitlement fund, such as Pell Grant.

4. To set the parameters, refer to the following table.

The following table describes the parameters for the Awards - Award a Single Fund concurrent process.

Table 9–18 Awards - Award a Single Fund Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Fund Code	Select the fund. This is a mandatory parameter.
Distribution Plan	Select the distribution plan. This is a mandatory parameter.
Person Number	Select the person number.
Person Group	Select the person ID group.
Minimum Amount	Specify the minimum award amount for the fund for each student. The specified value overrides the Min Award Amount value specified in the Fund Manager window during setup. If specified, ensure that the parameter value exceeds the minimum amount defined during setup. If not, the process skips the student and logs an error message.
Maximum Amount	Specify the maximum award amount for the fund for each student. The specified value overrides the Max Award Amount value specified in the Fund Manager window during setup. If specified, ensure that the parameter value is lower than the maximum amount defined during setup. If not, the process skips the student and logs an error message.

Table 9–18 (Cont.) Awards - Award a Single Fund Parameters

Parameter	Description
Allow to Exceed	<p>Specify if the selected fund can exceed the student COA or Need.</p> <p>Do not specify a value for this parameter while awarding a federal fund or an entitlement fund, such as Pell Grant.</p> <p>If you select COA, the process awards the maximum award amount to the student regardless of the student COA.</p> <p>If you select Need, the process awards the maximum amount (up to the COA maximum amount) to the student regardless of the student need.</p>
Send Award Notification	<p>Select Y or N. Choose Y to send award notification to students.</p> <p>If you select Yes, the process sets the award notification status on the financial aid base record to Ready to Submit. When run, the Financial Aid - Award Notification Letter concurrent process uses this status to identify the students for whom the award notification letters are to be generated.</p>

9.4.4.4 Awarding Funds Manually

Use the Student awards window to award funds to students manually. When you award a fund, the application checks and validates the awarded amount and student data against the requirements and attributes defined for the fund in the Fund Manager window during setup. Some of the validations that the application performs are as follows:

- Checks the student EFC and COA to determine need before awarding all funds.
 - If the selected student has not been assigned COA or EFC, a warning message is displayed when you award funds. Click **Continue** to proceed with the awarding. There are exceptions to this, such as federal PLUS loans.
 - If the awarded amount exceeds student need, a warning message is displayed prompting you to insert holds on the overawarded amount. Choose **Yes** to place holds, **No** to continue awarding without placing holds, or **Cancel** to discontinue with the awarding.
- Checks whether the student meets the required conditions to receive the fund.
- Checks if any amount is available for awarding or not.
- Checks the awarded amount against the defined award limits for the fund, except for Pell Grant. The application checks the awarded amount against the minimum and maximum award amounts, maximum yearly amount, and

maximum life time amount defined for the fund during setup. If the fund exceeds any defined limit, a message box is displayed. You can click **Yes** in the message box to continue with the awarding or **No** to cancel it.

- Checks whether the awarded fund exceeds the maximum number of times the fund can be awarded.
- ISIR records are no longer required when manually awarding a federal fund.

Prerequisites

Refer to [Prerequisites](#) for [Awarding Multiple Funds](#).

Navigation

Financial Aid > Student Awards > Student Awards

Steps

1. Query a record.
2. Select any row in the Awards region.
3. Select **File > New**. A blank row is added to the Awards region.
4. Select the fund from the Fund Code list of values.
5. Specify the disbursement plan for the fund. Ensure that common terms exist between the terms associated with the selected disbursement plan and the student COA items. If common terms do not exist, a warning message is displayed.
6. Specify the status. While adding an award manually, you can set the status to either **Offered** or **Accepted**.
7. Enter the amount in the Offered Amount field.

Note: In case of Pell Grant, if a valid Payment or Awarding ISIR exists, the user is not allowed to enter an amount in the Offered Amount field. If the Payment or Awarding ISIR does not exist, the user is given the option to continue.

8. Save your work.

Guidelines

For a Direct Loan award, you cannot enter decimals. If you enter decimals, the application changes them to **.00**.

You can award federal funds to students without ISIR records. You should be careful while awarding a Pell Grant manually to a student without an ISIR record. Due to the absence of EFC, the award is not validated against the Pell schedule at the time of awarding.

While awarding IM-based funds, the PROFILE EFC is used. In addition, PROFILE EFC is used to determine whether awarding an IM fund causes an overaward or not.

9.4.5 Performing Post-awarding Tasks

Post-awarding tasks include the following:

- [Viewing Award Aggregate Details](#)
- [Viewing and Updating Student Award Details](#)
- [Generating Award Notification Letters](#)
- [Canceling Issued Awards](#)

9.4.5.1 Viewing Award Aggregate Details

Consider a scenario in which you need to determine the total amount awarded to a student over multiple award years. Alternatively, you need to determine the amount of a particular fund awarded to the student over multiple award years. In such cases, you can view award aggregate details based on award year or fund code.

Prerequisites

Students are awarded funds.

Navigation

Financial Aid > Student Awards > Aggregate Awards By Award Year/Fund Code

Financial Aid > Student Awards > Aggregate Awards By Fund Code/Award Year

Additional Notes

Query a record in the Aggregate Awards By Award Year/Fund Code window to view student award details sorted by the award year.

Query a record in the Aggregate Awards By Fund Code/Award Year window to view student award details sorted by the fund code.

9.4.5.2 Viewing and Updating Student Award Details

You can view and modify student award details by using the Student Awards window.

Prerequisites

Students are awarded funds.

Navigation

Financial Aid > Student Awards > Student Awards

Steps

1. Query a record. The top-most region of the window displays student details, such as SSN, Full Name, Award Year, Effective Dates, and Payment ISIR ID. The fields in this region are read-only.

If disbursement holds exist for the selected student, the text *Holds Exist* is displayed on the top-right corner of the Student Awards window.

2. Refer to the following table to view the appropriate information in the window.

The following table describes the tasks you can perform to view student award details.

Table 9–19 Viewing Student Award Details

To View	Perform the Following
Details of the funds awarded to the student	View the information in the Awards region.
Distribution plan used to award a fund	View the value in the Distribution Plan field.
Offered, accepted, and paid amounts for a fund	View the information in the Offered Amount, Accepted Amount, and Paid Amount fields.
Details of the terms associated with an awarded fund	Select a row in the Awards region and view the information in the Terms region.
Details of the Transaction ID of the ISIR record used to award Pell Grant to the student	View the value in the Aid Application Number field of the selected row.
Award ID for an award	View the information in the Award ID field.

Table 9–19 (Cont.) Viewing Student Award Details

To View	Perform the Following
The date on which an award was created	View the information in the Creation Date field.
The reference number of an imported legacy award	View the information in the Award Reference Number field. This field is populated only for awards imported from a legacy system.

3. Refer to the following table to update student award details.

The following table describes the tasks you can perform to update student award details.

Table 9–20 Updating Student Award Details

To	Perform the Following Steps
Award a fund	Refer to Awarding Funds Manually .
Delete a simulated award	<ol style="list-style-type: none">1. Select the award row.2. Select Edit > Delete. <p>You can only delete simulated awards. You cannot delete actual awards.</p>
Verify if a verification hold on disbursements exists for a student	<p>Check if the Verification hold on disbursement check box is selected. If yes, a verification hold on disbursements exists for a student.</p> <p>This check box indicates that the student's disbursements are held due to a change in the verification process status. Consider a scenario in which a student's verification process status changes from a terminal status to a non-terminal status after funds are awarded. In such cases, the check box is selected to indicate that you need to check the relevance of the awarded package because of the modifications to the financial aid application after verification.</p> <p>This check box displays the correct information, only if the Ignore Verification and Application Process Statuses check box is not selected in the Fund Manager window during setup.</p>

Table 9–20 (Cont.) Updating Student Award Details

To	Perform the Following Steps
Modify the award amounts	<ol style="list-style-type: none"> 1. Select the award row. 2. Click Disbursement Details. <p>The Disbursement Details button is disabled if the awarded fund is a work study or sponsorship.</p> <p>Based on the award row selected, the appropriate disbursement window is displayed. For more information on various disbursement windows, refer to Viewing and Modifying Disbursement Details.</p> 3. Modify the offered award amount in the Offered Amount field. <p>For a Direct Loan award, you cannot enter decimals.</p> 4. Modify the accepted award amount in the Accepted Amount field. 5. Click Done to return to the Student Awards window. The Student Awards window displays the new offered and accepted amounts. 6. Save your work.
Update the award status	<ol style="list-style-type: none"> 1. Select the award row. 2. Specify the award status in the Award Status field. You can only update the status from: <ul style="list-style-type: none"> ■ Offered to Accepted or Canceled ■ Accepted to Canceled ■ Canceled to Offered ■ Declined to Canceled or Offered <p>Other ways of updating the award status are not permitted.</p> <p>You cannot update the status of a Pell Grant award from Cancelled or Declined to Offered or Accepted.</p> <p>If a fund is awarded in simulated mode, the fund’s status is set to Simulated. You cannot update the status of simulated awards.</p>
Lock a Pell Grant award	<ol style="list-style-type: none"> 1. Select the award row. 2. Select the Lock Award check box. When run, the Awards - Repackage Pell Grant concurrent process, ignores all locked Pell Grant awards. In addition, you cannot update the offered and accepted amounts of a locked award. To modify a locked Pell Grant award, you must deselect the Lock check box and update the award details either manually or automatically. 3. Save your work.

Table 9–20 (Cont.) Updating Student Award Details

To	Perform the Following Steps
View or modify work study details	<ol style="list-style-type: none">1. Select the award row.2. Click Work Study Details. <p>The Work Study Details button is enabled only if the selected fund is a work study and sponsorship.</p> <p>The Student Work Award Progress window displays the work study and payroll details. For more information on modifying work study details, refer to Viewing and Updating Employment Details.</p>
View and modify the disbursement details	Refer to Viewing and Modifying Disbursement Details .

9.4.5.3 Generating Award Notification Letters

After awarding is complete, you can generate award notifications for one or more students by running the Financial Aid - Award Notification Letter concurrent process.

You can only generate letters for students whose award notification status is set to **Ready to Submit** in the financial aid base record. In addition, you can generate letters only for open award years.

Prerequisites

The setup for the subsystem is complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Financial Aid - Award Notification Letter concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To specify the Person Group, use either static or dynamic person ID groups. For information on creating person groups, refer to [Creating Person Details](#) in Person.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the Financial Aid - Award Notification Letter concurrent process.

Table 9–21 Financial Aid - Award Notification Letter Parameters

Parameter	Description
Document Name	Select a predefined letter format. This is a mandatory parameter.
Selection Criteria	Specify the criteria for selecting the students. Choose G to send the letter to a group of students or S to send the letter to a single student. This is a mandatory parameter.
Person ID Group	Select the person group.
Person Number	Select the person number.
Automatic Term Selection	Select Yes or No . Choose Yes to send term-based information to students. This is a mandatory parameter.
Delivery Type	Select the delivery method. The delivery methods available are: <ul style="list-style-type: none"> ■ E-MAIL ■ E-MAIL/FAX ■ E-MAIL/FAX/PRINT ■ E-MAIL/PRINT ■ FAX ■ FAX/PRINT ■ PRINT This is a mandatory parameter.
Printer Name	If the selected delivery type includes PRINT, specify the path and name of the printer.
Fax Number	If the selected delivery type includes FAX, specify the fax number of the student.
Award Year	Select the award year. This is a mandatory parameter.
Load Calendar 1	Select the load calendar in the award year. An award year is divided into load calendars. You can specify the load calendars for which to generate letters.

Table 9–21 (Cont.) Financial Aid - Award Notification Letter Parameters

Parameter	Description
Load Calendar 2	Select the load calendar in the award year.
Load Calendar 3	Select the load calendar in the award year.
Load Calendar 4	Select the load calendar in the award year.
Load Calendar 5	Select the load calendar in the award year.
Load Calendar 6	Select the load calendar in the award year.

9.4.5.4 Canceling Issued Awards

Run the Awards - Cancel Offered Awards concurrent process to cancel awards issued to enrolled students.

The process checks the awards expiration date (defined in the Fund Manager window during setup) and cancels offered awards if the award expiration date has passed. The process updates the status of all cancelled awards to **Cancelled**.

Prerequisites

The setup for the subsystem is complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Awards - Cancel Offered Awards concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can run the process either in fund or award year mode.
 - In the fund mode, the process only checks for awards issued for the specified fund. To run the process in the fund mode, specify values for the Award Year and Fund Code parameters.
 - In the award year mode, the process checks all funds. To run the process in fund mode, specify a value for the Award Year parameter.
3. By default, the process considers all the students in the selected award year. To run the process for a single student, specify a value for the Person Number parameter.

4. To set the parameters, refer to the following table.

The following table describes the parameters for the Awards - Cancel Offered Awards concurrent process.

Table 9–22 Awards - Cancel Offered Awards Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Fund Code	Select the fund code.
Person Number	Select the person number.

9.5 Processing Federal Pell Grant

9.5.1 Overview

The Federal Pell Grant program provides financial aid to undergraduate students. The amount awarded to a student is based on student need and enrollment status, such as part time, half time, or full time. In most educational institutions, a student requires half time status to qualify for Pell Grant.

A student’s eligibility for Pell Grant does not depend on the availability of funds at the institution. The U.S. Department of Education provides funds to each participating educational institution and offers Pell Grant to all eligible students. Based on payment data, the department provides funds to each educational institution. The institution is not responsible for selecting recipients. However, the institution ensures that each recipient fulfills the eligibility criteria for the Federal Pell Grant Program.

Processing Pell Grant involves the following tasks:

- [Awarding Pell Grant](#)
- [Creating Pell Records](#)
- [Managing Pell Grant Origination](#)
- [Managing Pell Grant Disbursement](#)
- [Disbursing Pell Grant](#)
- [Maintaining Pell Grant Data](#)

Pell Grant processing begins with awarding Pell Grant to students. For more information, refer to [Awarding Pell Grant](#).

After awarding, you create Pell origination and disbursement records for all awarded students. Institutions use these records to report Pell Grant data to COD. For more information on creating Pell records, refer to [Creating Pell Records](#).

Institutions can resend Pell origination or disbursement records to update existing Pell Grant data. For example, if there are changes to student data that affect the award amount or if COD sets values that you wish to change, you can update and resend the Pell record. If COD rejects a Pell origination or disbursement record, you can resend the record after addressing the errors.

Institutions report Pell Grant data to COD by sending Pell origination records. Based on the accepted origination data, COD provides Pell Grant funds to the institution. For more information, refer to [Managing Pell Grant Origination](#).

Institutions report disbursement data to COD by sending Pell disbursement records. For more information on managing disbursement, refer to [Managing Pell Grant Disbursement](#).

Once Pell Grant disbursement records are accepted by COD and disbursements are made to the students, Pell Grant processing is complete. For more information, refer to [Disbursing Pell Grant](#).

Institutions must perform various maintenance tasks, such as importing year-to-date records and multiple reporting records. For more information, refer to [Maintaining Pell Grant Data](#).

9.5.2 Awarding Pell Grant

Awarding Pell Grant to students includes:

- [Awarding Pell Grant](#)
- [Recalculating Pell Grant](#)

9.5.2.1 Awarding Pell Grant

You can automatically award Pell Grant to students by using the Awards - Award Students or the Awards - Award a Single Fund concurrent process. For more information, refer to [Awarding Multiple Funds](#) and [Awarding a Single Fund](#).

Use the Student Awards window to award Pell Grant to students manually. For more information, refer to [Awarding Funds Manually](#).

9.5.2.2 Recalculating Pell Grant

Consider a scenario in which the student attendance type changes from part time to full time. In such a case, you recalculate the student Pell Grant. The Awards - Repackage Pell Grant concurrent process recalculates the Pell Grant to be awarded to a student or multiple students. This process checks the latest student data and repackages the Pell grant accordingly.

If the recalculated Pell amount differs from the original amount, the process adds a new disbursement record as a **Planned** transaction for the student. If this process modifies a Pell Grant award, it sets the distribution plan field for the award to a blank value. This is because the award modification results in a deviation from the distribution plan. If the awarded amounts are the same, a message stating this is displayed.

Note: This process does not repackage Pell Grant if the status of the student disbursement record is **Sent** or the origination record is sent with an amount that is less than the repackaged amount.

This process derives the student key program from the current term record. If the term record does not exist, the process uses the key program assigned to the student's program attempt.

Prerequisites

Students are awarded Pell Grant.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Awards - Repackage Pell Grant concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. You can select the students by using the Person Number or Person Group parameters. Although these parameters are optional, you must specify one of the parameters.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the Awards - Repackage Pell Grant concurrent process.

Table 9–23 Awards - Repackage Pell Grant Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Select the person number.
Person Group	Select the person group.
Test Run	Specify whether to run the process in test or actual mode. Choose Y to run the process in test mode to get an idea of how the actual awarding happens. You can view the log and out files when you run the process in test mode. This is a mandatory parameter.
Cancel Invalid Pell Awards	Specify whether the process should cancel invalid Pell Grant awards. Choose Y to verify if the awarded students are still eligible for Pell Grant. If not, the process cancels the offered awards. This process also cancels the existing planned disbursements if student is not eligible. This is a mandatory parameter.

9.5.3 Creating Pell Records

Pell Grant is a federal fund available to all undergraduate students. Educational institutions communicate with the COD system of the U.S. Department of Education to report on and request for Pell Grant funds. COD approves Pell Grant payments for each participating institution based on the data reported through Pell origination and disbursement records.

You run the Pell Grant - Create Pell Grant Records from Awards concurrent process to create Pell records for all students who are awarded Pell Grant. The process performs the following tasks:

- 1. Scans all Pell awards for students, regardless of whether the student is awarded automatically or manually.
- 2. Validates the details of students awarded Pell Grant.
- 3. Checks for the existence of the Awarding ISIR record for each student. If the Awarding ISIR does not exist, the process skips the student and logs an error in the log file.

4. Compares the Awarding ISIR and Payment ISIR records for each student. If the two differ, the process skips the student and logs an error in the log file.
5. Derives the student enrollment status.
6. Creates a Pell origination record for each awarded Pell Grant, if it does not exist.
7. Creates Pell disbursement records for the awarded Pell Grant. The number of the disbursement records created depends on how the Pell amount is disbursed.
8. Sets the status of the Pell origination records to **Ready to Send**, if all validations are met.

This process derives the student key program from the current term record. If the term record does not exist, the process uses the key program assigned to the student's program attempt.

After this process is run, Pell origination and disbursement records are created for each Pell Grant award. If required, you can view and modify the Pell records. For more information, refer to [Viewing and Updating Pell Grant Details](#).

Prerequisites

Students are awarded funds, either automatically or manually.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Pell Grant - Create Pell Grant Records from Awards concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. You can run the process for an individual student or for all students in the selected award year. By default, the process runs for all the students in the selected award year. To run the process for a single student, specify a value for the Person Number parameter.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Create Pell Grant Records from Awards concurrent process.

Table 9–24 Pell Grant - Create Pell Grant Records from Awards Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Specify the person number.

9.5.4 Managing Pell Grant Origination

Pell Grant origination involves:

- [Originating Pell Grant](#)
- [Importing Origination Acknowledgement Details](#)

9.5.4.1 Originating Pell Grant

After Pell origination records are created, educational institutions send the origination records to COD. You run the Pell Grant - Create Pell Grant Origination File concurrent process to send origination details to COD. This process performs the following tasks:

1. Picks up records from the origination table.
2. Checks if the Pell records have a status of **Ready to Send**.
3. Derives the student key program from the current term record. If the term record does not exist, the process uses the key program assigned to the student's program attempt.
4. Updates the status of the origination records to **Sent**.
5. Updates the student enrollment status based on the selected run mode and student data.
6. Validates the student ISIR data when run in the **ACTUAL_PELL** mode. The process checks if the Transaction ID used to create the student Pell record matches the student Payment ISIR record. If the two do not match, the process skips the student and adds an error message to the log file.
7. Generates a flat file containing details of students awarded Pell Grant.

To view the flat file, click View Output in the Submit Request window. For more information, refer to [Concurrent Process Procedures](#). You send this file to COD using a transmission method, such as EDConnect.

Prerequisites

Student Pell origination records exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Pell Grant - Create Pell Grant Origination File concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can run this process for an individual student, a group of students, or all students in an award year. To run the process for a single student, specify a value for the Person Number parameter. To run the process for a person group, specify a value for the Person Group parameter. If you do not specify a value for the Person Number or Person Group parameters, the process considers all the students in the selected award year.
3. You can run the process in different modes. If the student has not enrolled as yet and student data is not available, run the process in **MAX_PELL** mode. If student data, such as attendance type, EFC, and COA, is available run the process in **ACTUAL_PELL** or **FULL _TIME** mode.
4. The Pell IDs of the reporting and attending campuses are submitted on the Pell record to the COD. Institutions use the Reporting Pell ID and Attending Pell ID to filter the way the Pell origination files are generated.
5. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Create Pell Grant Origination File concurrent process.

Table 9–25 Pell Grant - Create Pell Grant Origination File Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Select the person number.
Reporting Pell ID	Select the Pell ID for the financial aid office or educational institution. This is a mandatory parameter.

Table 9–25 (Cont.) Pell Grant - Create Pell Grant Origination File Parameters

Parameter	Description
Attending Pell ID	Select the Pell ID for the campus within the educational institution, if any. If not, the attending Pell ID is the same as the reporting Pell ID.
Person Group	Select the person group.
Run Mode	<p>Specify the mode in which to run the process. You can select ACTUAL_PELL, FULL_TIME, or MAX_PELL.</p> <p>Choose ACTUAL_PELL to calculate the Pell Grant award based on the following:</p> <ul style="list-style-type: none">▪ Student attendance type from the student disbursement records▪ EFC from the student Awarding ISIR record▪ Pell COA of the student <p>Choose FULL_TIME to calculate the Pell Grant award based on the following:</p> <ul style="list-style-type: none">▪ Full time attendance type▪ EFC from the student Awarding ISIR record▪ Maximum COA of 99999 <p>Choose MAX_PELL to calculate the Pell Grant award based on the following:</p> <ul style="list-style-type: none">▪ Full time attendance type▪ Zero EFC▪ Maximum COA of 99999 <p>This is a mandatory parameter.</p>

9.5.4.2 Importing Origination Acknowledgement Details

After you send the Pell origination data, COD processes the details and returns the records after validation in the form of an acknowledgement file. The acknowledgement file confirms the receipt of the records. For each record, COD sets the Pell record status to either A (Accepted), C (Corrected), D (Duplicate), or E (Rejected). The acknowledgment file also includes the values of the amount approved by COD and other data corrections, if any.

Run the Pell Grant - Upload Origination Acknowledgements request set to import acknowledgement details into Oracle Student System. This process updates the Pell record status to the status specified in the acknowledgment file.

After the acknowledgement is received, you can review, update, and resend the origination records. COD must accept origination records to facilitate processing of Pell disbursement records. For more information, refer to [Viewing and Updating Pell Grant Details](#).

Prerequisites

Pell origination acknowledgement file is received from COD.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the Pell Grant - Upload Origination Acknowledgements request set.
For information on running the request set, see [Concurrent Process Procedures](#).
The Pell Grant - Upload Origination Acknowledgements request set consists of the following two processes:
 - Pell Acknowledgements Loader: Loads acknowledgement details from the flat file into a temporary table.
 - Pell Origination Acknowledgement: Loads data from the temporary table into Oracle Student System.
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Upload Origination Acknowledgements request set.

Table 9–26 Pell Grant - Upload Origination Acknowledgements Parameters

Parameter	Description
Pell Acknowledgements Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
Pell Origination Acknowledgement concurrent process	NA

Table 9–26 (Cont.) Pell Grant - Upload Origination Acknowledgements Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.

9.5.5 Managing Pell Grant Disbursement

Disbursing Pell Grant involves:

- [Creating Disbursement Details](#)
- [Importing Disbursement Acknowledgement Details](#)

9.5.5.1 Creating Disbursement Details

After you receive acknowledgment of the origination records, run the Pell Grant - Create Pell Grant Disbursement File concurrent process to create disbursement records to send to COD.

This process performs the following tasks:

1. Picks up records from the disbursement table with **Ready to Send** status.
2. Checks if the Pell origination record has a status of **Accepted**.
3. Validates the student ISIR data. This process checks if the Transaction ID used to create the student Pell origination record matches the student Payment ISIR record. If the two do not match, the process skips the student and adds an error message to the log file.
4. Derives the student key program from the current term record. If the term record does not exist, the process uses the key program assigned to the student's program attempt.
5. Updates the status of the Pell disbursement records to **Sent**.
6. Generates a flat file containing student Pell disbursement details.

To view the flat file, click View Output in the Submit Request window. For more information, refer to [Concurrent Process Procedures](#).

Prerequisites

COD origination acknowledgement is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Pell Grant - Create Pell Grant Disbursement File concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. You can run this process for an individual student or for all students in an award year. To run the process for a single student, specify a value for the Person Number parameter. If you do not specify a value for the Person Number parameter, the process considers all the students in the selected award year.
- 3. The Pell IDs of the reporting and attending campuses are submitted on the Pell record to the COD. Institutions use the Reporting Pell ID and Attending Pell ID to filter the way the Pell origination files are generated.
- 4. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Create Pell Grant Disbursement File concurrent process.

Table 9–27 Pell Grant - Create Pell Grant Disbursement File Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Select the person number.
Reporting Pell ID	Select the Pell ID for the financial aid office or educational institution. This is a mandatory parameter.
Attending Pell ID	Select the Pell ID for the campus within the educational institution, if any. If not, the attending Pell ID is the same as the reporting Pell ID.

9.5.5.2 Importing Disbursement Acknowledgement Details

After you send Pell disbursement data, COD processes the details and returns the records after validation in the form of an acknowledgement file. The acknowledgement file confirms the receipt of the disbursement data. For each record, COD sets the status of either A (Accepted), C (Corrected), D (Duplicate), or

E (Rejected). The acknowledgment file also includes the values of the amount approved by COD and other data corrections, if any.

Run the Pell Grant - Upload Disbursement Acknowledgements request set to upload acknowledgement details into Oracle Student System. This process updates the Pell disbursement record status to the status specified in the acknowledgment file.

After the acknowledgement is received, you can review and update the records. For more information, refer to [Viewing and Updating Pell Grant Details](#).

Prerequisites

Pell disbursement acknowledgement file is received from COD.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the Pell Grant - Upload Disbursement Acknowledgements request set.
For information on running the request set, see [Concurrent Process Procedures](#).
The Pell Grant - Upload Disbursement Acknowledgements request set consists of the following two concurrent processes:
 - Pell Disbursements Loader: Loads acknowledgement details from the flat file into a temporary table.
 - Pell Disbursements Acknowledgement: Loads data from the temporary table into Oracle Student System.
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Upload Disbursement Acknowledgements request set.

Table 9–28 Pell Grant - Upload Disbursement Acknowledgements Parameters

Parameter	Description
Pell Disbursements Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.

Table 9–28 (Cont.) Pell Grant - Upload Disbursement Acknowledgements Parameters

Parameter	Description
Pell Disbursements Acknowledgement concurrent process	NA
Award Year	Select the award year. This is a mandatory parameter.

9.5.6 Disbursing Pell Grant

After COD acknowledges student disbursement records, you disburse the Pell Grant. For information about disbursing Pell Grant, refer to [Disbursing Awards](#).

9.5.7 Maintaining Pell Grant Data

Maintaining Pell Grant data involves:

- [Viewing and Updating Pell Grant Details](#)
- [Importing Year-to-Date Records](#)
- [Uploading Multiple Reporting Records Data](#)
- [Uploading Statement of Accounts Data](#)

You can view or update Pell origination and disbursement records. For more information, refer to [Viewing and Updating Pell Grant Details](#).

COD sends year-to-date (YTD) records in the form of a flat file. To access YTD records, you must import the flat file into Oracle Student System. For more information on importing YTD records, refer to [Importing Year-to-Date Records](#).

COD sends multiple reporting records (MRR) data as a flat file. To access MRR data, upload the flat file into Oracle Student System. For more information on uploading MRR data, refer to [Uploading Multiple Reporting Records Data](#).

COD sends the statement of account file to educational institutions to notify them of their Pell Grant authorization. The statement of account file is sent in the form of a flat file. To view the authorization data, you must upload the flat file into Oracle Student System. For more information on uploading statement of account data, refer to [Uploading Statement of Accounts Data](#).

9.5.7.1 Viewing and Updating Pell Grant Details

COD rejects origination or disbursement records if student data is incomplete. In such cases, you need to update the Pell records and resend them to COD.

The Pell Origination window displays the selected student’s Pell origination record. Use the Pell Origination window to review and update Pell origination records. Use the Pell Disbursements window to review and update the student Pell disbursement records.

Prerequisites

Students are awarded Pell Grant.

Navigation

Financial Aid > Pell Grant Processing > Pell Origination

Financial Aid > Pell Grant Processing > Pell Origination > Pell Disbursements

Steps

- 1. Select the award year from the Award Year list of values. The Effective Dates fields are populated.
- 2. Select the student from the Person Number list of values. The student’s Pell Grant details are displayed.

You can perform multiple tasks in the Pell Origination window. You cannot modify records with **Sent** status. You can only modify records with a status **Ready to Send, Not Ready, Rejected, Accepted, Duplicate, or Corrected**. After you modify a record, the status changes to **Ready to Send**.

- 3. Refer to the following table to perform the appropriate task.

The following table describes the various tasks you can perform in to update Pell Grant details.

Table 9–29 Updating Student Pell Grant Details

To View or Update	Perform the Following Steps
Record status	Select the status from the Origination Status list of values.
Award amount	Specify the amount in the Pell Award field of the Pell - I tab.

Table 9–29 (Cont.) Updating Student Pell Grant Details

To View or Update	Perform the Following Steps
The amount that the student would be eligible for if his enrollment status is full time	View the amount in the Scheduled Award field of the Pell - I tab.
Student COA	Specify the COA in the COA field of the Pell - I tab.
Enrollment status	Select an option from the Enrollment Status list of values in the Pell - I tab.
Enrollment date	Specify the student enrollment date in the Enrollment Date field in the Pell - I tab.
Transaction ID	<p>Select the Transaction ID from the Transaction Number list of values in the Pell - I tab. The list of values displays the Payment ISIR records for the selected student.</p> <p>After you select the Payment ISIR record and save the record, the origination status is set to Ready to Send.</p> <p>You cannot update the Transaction ID for records with an origination status of Sent.</p>
Payment periods	<p>Enter a value in the Payment Periods field in the Pell - I tab.</p> <p>Typically, payment periods map to terms or teaching periods.</p>
First disbursement date	Specify the date in the First Disbursement Date field in the Pell - I tab.
Pell formula used for the student	Select an option from the Payment Method list of values field in the Pell - II tab.
Weeks of instructional time used to calculate the award	<p>Enter a value in the Payment Weeks field in the Pell - II tab.</p> <p>This field is blank if the Pell formula 1 is used for the student.</p>
Expected credit or clock hours for the student in the award year	<p>Enter a value in the Expected Hours field in the Pell - II tab.</p> <p>This field is blank if the Pell formula 1, 2, 3 or 4 is used for the student.</p>
Student incarcerated status	<p>Specify a value for the Incarcerated Code field in the Pell - II tab.</p> <p>Leave the field blank to indicate that the student is not incarcerated. Choose Student is incarcerated to indicate that the student is currently incarcerated. Choose Student is no longer incarcerated to change the student status if you previously reported the student incarcerated.</p>

Table 9–29 (Cont.) Updating Student Pell Grant Details

To View or Update	Perform the Following Steps
Student verification status	Select an option from the Verification Status list of values in the Pell - II tab.
Calendar that applies to the student program	<p>Select an option from the Academic Calendar list of values in the Pell - II tab.</p> <p>Choose 1- Credit Hours - non standard terms to indicate that the student program uses non-standard terms and student progress is measured by using credit hours.</p> <p>Choose 2- Credit Hours - standard terms of quarters to indicate that the student program is spread across quarters and student progress is measured by using credit hours.</p> <p>Choose 3- Credit Hours - standard terms of semesters to indicate that the student program is spread across semesters and student progress is measured by using credit hours.</p> <p>Choose 4- Credit Hours - standard terms of trimesters to indicate that the student program is spread across trimesters and student progress is measured by using credit hours.</p>
Weeks in the student program	<p>Enter a value in the Academic Weeks field in the Pell - II tab.</p> <p>This field is blank if the Pell formula 1 is used for the student.</p>
Expected credit or clock hours associated with the student program in the academic year	<p>Enter a value in the Academic Hours field in the Pell - II tab.</p> <p>This field is blank if the Pell formula 1, 2, 3 or 4 is used for the student.</p>
Family contribution used to calculate the award amount	<p>Select an option from the Secondary Family Contribution Code list of values in the Pell - II tab.</p> <p>Choose Pell award based on Original Family Contribution to indicate that the primary EFC is used to determine the award amount.</p> <p>Choose Pell award based on Secondary Family Contribution to indicate that the secondary EFC is used to determine the award amount.</p>
Disbursement details	Refer to Updating Pell Grant Disbursement Details .

You cannot modify values for the Low Tuition/Fees Code and Secondary Family Contribution fields in the Pell - II tab.

9.5.7.2 Importing Year-to-Date Records

The educational institution sends student origination and disbursement information to COD. COD processes and stores this data. When requested by the institution, COD sends the aggregated student data in the form of *YTD records*.

YTD records are a summary of student origination and disbursement information submitted by the institution. YTD records only include information about accepted and amended records.

If a database is corrupted, educational institutions can rebuild it by using the YTD records. Alternatively, institutions can request for and upload YTD data at regular intervals as part of Pell Grant reconciliation.

Run the Pell Grant - Import Year-to-Date Data request set to import YTD records to Oracle Student System.

Prerequisites

YTD records are received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the Pell Grant - Import Year-to-Date Data request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The Pell Grant - Import Year-to-Date Data request set consists of the following two concurrent processes:

- Pell Year-to-Date Loader Process: Loads YTD records from the flat file into a temporary table.
- Pell Year-to-Date Data Upload: Loads data from the temporary table into Oracle Student System.

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Import Year-to-Date Data request set.

Table 9–30 Pell Grant - Import Year-to-Date Data Parameters

Parameter	Description
Pell Year-to-Date Loader Process concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
Pell Year-to-Date Data Upload concurrent process	NA
Award Year	Select the award year. This is a mandatory parameter.

9.5.7.3 Uploading Multiple Reporting Records Data

COD maintains information about all students who are awarded Pell Grant. Consider a scenario in which COD receives an origination or disbursement record for an existing student. This implies that two educational institutions are processing Pell Grant requests for the same student. In such cases, COD sends multiple reporting records (MRR) to notify the educational institutions. Institutions use MRR data to analyze and reduce potential overpayments.

COD sends MRR data on request. However, in some situations, COD sends MRR data automatically.

You run the Pell Grant - Upload Multiple Reporting Record Data request set to import the MRR data into Oracle Student System. You can only view MRR data.

Prerequisites

MRR data is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

- 1. Run the Pell Grant - Upload Multiple Reporting Record Data request set.
For information on running the request set, see [Concurrent Process Procedures](#).

The Pell Grant - Upload Multiple Reporting Record Data request set consists of the following two concurrent processes:

- Pell Multiple Reporting Record Loader Process: Loads MRR data from the flat file into a temporary table.
- Pell Multiple Reporting Record Data Upload: Loads data from the temporary table into Oracle Student System.

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Upload Multiple Reporting Record Data request set.

Table 9–31 Pell Grant - Upload Multiple Reporting Record Data Parameters

Parameter	Description
Pell Multiple Reporting Record Loader Process concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
Pell Multiple Reporting Record Data Upload concurrent process	NA
Award Year	Select the award year. This is a mandatory parameter.

9.5.7.4 Uploading Statement of Accounts Data

Institutions receive notification of the authorized funds from the COD in the form of a statement of account file. During the award year, COD makes the necessary adjustments to the authorization based on the data reported by the educational institution.

The statement of account is a fixed-length record of 200 bytes. After COD places the statement of account file on the network, an institution can retrieve the file at any time during the next six months. If not retrieved in the six-month period, the statement of account files are deleted.

You can upload all the statement of account data or its summary into Oracle Student System for viewing. You cannot process the statement of account data. To upload the statement of accounts data, run the Pell Grant - Upload Statement of

Account Detail request set. Alternatively, to upload the statement of accounts summary, run the Pell Grant - Upload Statement of Account Summary request set.

Prerequisites

The statement of accounts file is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

To upload details of the statement of accounts data:

1. Run the Pell Grant - Upload Statement of Account Detail request set.
For information on running the request set, see [Concurrent Process Procedures](#).
The Pell Grant - Upload Statement of Account Detail request set consists of the following two concurrent processes:
 - Pell Electronic Statement Detail Loader: Loads the statement of account data from the flat file into a temporary table.
 - Pell Electronic Statement of Account Record - Detail: Loads data from the temporary table into Oracle Student System.
2. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Upload Statement of Account Detail request set.

Table 9–32 Pell Grant - Upload Statement of Account Detail Parameters

Parameter	Description
Pell Electronic Statement Detail Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
Pell Electronic Statement of Account Record - Detail concurrent process	NA

Table 9–32 (Cont.) Pell Grant - Upload Statement of Account Detail Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.

To upload a summary of the statement of accounts data:

1. Run the Pell Grant - Upload Statement of Account Summary request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The Pell Grant - Upload Statement of Account Summary request set consists of the following two concurrent processes:

- Pell Electronic Statement Summary Loader: Loads the statement of account data from the flat file into a temporary table.
- Pell Electronic Statement of Account Record - Summary: Loads data from the temporary table into Oracle Student System.

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Pell Grant - Upload Statement of Account Summary request set.

Table 9–33 Pell Grant - Upload Statement of Account Summary Parameters

Parameter	Description
Pell Electronic Statement Summary Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
Pell Electronic Statement of Account Record - Summary concurrent process	NA
Award Year	Select the award year. This is a mandatory parameter.

9.6 Processing Student Loans

9.6.1 Overview

A student can receive financial aid in the form of various types of loans. For more information on the types of loans available, see [Types of Loans](#). If you are familiar with the available loans, proceed to the following section.

Processing student loans involves:

- [Awarding Loans](#)
- [Creating Loan Records](#)
- [Managing FFELP Loans](#)
- [Managing Direct Loans](#)
- [Managing Loan Data](#)
- [Validating Loan Data](#)
- [Generating Disbursement Letters](#)
- [Disbursing Loans](#)

Loan processing begins with awarding loans to students. Students are awarded loans based on student data, such as EFC and COA. For more information on awarding loans, refer to [Awarding Loans](#).

After you award loans to students, you create loan origination and disbursement records for all awarded students. For more information on creating loan records, refer to [Creating Loan Records](#).

The Financial Aid subsystem processes FFELP, Alternative, and Perkins loans as FFELP loans. To process FFELP loans, institutions report loan data to external processors by sending loan records. For more information, refer to [Managing FFELP Loans](#).

To process Direct Loans, institutions communicate with COD and perform multiple activities, such as originate loan records, update origination records, and maintain loan data. For more information, refer to [Managing Direct Loans](#).

While processing loans, you can view and modify loan details. For more information, refer to [Managing Loan Data](#).

Before sending loan records to COD or the external processor, you can validate the records for completeness. For more information, refer to [Validating Loan Data](#).

Before disbursing loans, institutions send letters to students informing them of the disbursement. For more information, refer to [Generating Disbursement Letters](#).

After loan disbursement records are accepted, the institutions disburse loans to students. For more information on disbursing loans, refer to [Disbursing Loans](#).

9.6.2 Types of Loans

The types of loans available to students include:

- [Federal Direct Loans](#)
- [Federal Family Education Loan Program \(FFELP\) Loans](#)
- [Alternative Loans](#)
- [Perkins Loans](#)

9.6.2.1 Federal Direct Loans

Students can borrow directly from the U.S. Department of Education under the Federal Direct Student Loan Program (FDSLP). The FDSLP program is also known as the William D. Ford Direct Loan Program. There are three types of Direct Loans:

- **Federal Direct Subsidized Loans:** Subsidized loans are need-based. The government pays the loan interest while the student is in school. A six month grace period starts the day after the student is no longer enrolled at least half time at an eligible institution. Students are not required to make any payments and are not charged interest during the grace period. The grace period can be extended for individuals serving in active military duty.
- **Federal Direct Unsubsidized Loans:** Unsubsidized loans are not need-based and can replace student EFC in the packaging process. Students can choose to pay the interest while studying. If the interest is not paid, the interest is capitalized, resulting in a higher loan amount that is owed.
- **Federal Direct Parent Loan for Undergraduate Students (PLUS) Loans:** A Federal Direct PLUS loan is available only to eligible parents. For PLUS loans, the borrower must be creditworthy or obtain a creditworthy endorser for the loan. The parent is responsible for repaying the loan and the interest accrued from the time the loan is disbursed until it is fully repaid.

9.6.2.2 Federal Family Education Loan Program (FFELP) Loans

Students can borrow from third parties, such as lenders and guarantors, under the Federal Family Education Loan Program (FFELP) program. The FFELP program

utilizes the CommonLine 5 standards for FFELP and Alternative loan processing as defined by National Council of Higher Education Loan Programs (NCHELP). Educational institutions originate and process FFELP loans with lenders and guarantee agencies.

The FFELP program offers the same loans as the FDSLPL program.

- Subsidized Stafford Loans
- Unsubsidized Stafford Loans
- Parent Loan for Undergraduate Students (PLUS)

A Stafford loan is made to the student by a bank and guaranteed by a guarantor approved by the U.S. Department of Education. Similarly, a PLUS loan is made to the parent by a bank and guaranteed by an approved guarantor.

9.6.2.3 Alternative Loans

Alternative loans are loans provided by private lenders to supplement the government-funded student loan programs.

In the Financial Aid subsystem, Alternative loans are processed similar to FFELP loans.

9.6.2.4 Perkins Loans

Perkins loans include the following:

- Federal Perkins loans
- National direct student loans
- National defense student loans

Perkins loans are low-interest-rate loans funded by the institution by using repayments of previous Perkins loans and annual Federal Capital Contribution (FCC) funds from the federal government. The institution is considered the lender for Perkins loans. To process Perkins loans, you award the loan and disburse the funds.

9.6.3 Awarding Loans

You can award loans to students automatically or manually. Use the Awards - Award Students or Awards - Award a Single Fund concurrent process to automatically award loans to students. For more information, refer to [Awarding Multiple Funds](#) and [Awarding a Single Fund](#).

Use the Student Awards window to award loans to students manually. For more information, refer to [Awarding Funds Manually](#).

9.6.4 Creating Loan Records

The institution reports loan data to COD and external processors by sending loan records. COD approves Direct Loans based on the loan data reported by the institution. Similarly, the external processor (lender, guarantor or loan processor) approves FFELP loans based on the loan data reported by the institution.

To create loan records for all types of loans, run the Loans - Create Stafford and PLUS Applications from Awards concurrent process. This process works differently for FFELP and Direct Loans.

In case of FFELP loans, the process creates only one loan record containing origination and disbursement details. The loan record indicates student intent to take a loan, certifies student eligibility, and specifies the disbursement amount and dates. The process performs the following validations and checks:

- Updates the disbursement fees based on the lender and corresponding fees defined during setup
- For each student, checks for the student key program.
 - If no key program exists, the process does not create a loan record for the student.
 - If the key program exists and has an associated organizational unit, a loan record is created. If not, no loan record is created. The process uses the alternate ID of the student organizational unit to determine the School ID for the loan record.

For each awarded Direct Loan, this process creates a loan origination and one or more disbursement records. The number of the disbursement records created depends on the number of installments in which the loan amount is disbursed.

For both FFELP and Direct Loans, this process derives student enrollment details, such as key program, attendance type, and class standing, from the current term record. If a term record does not exist, the process uses the details associated with the student program attempt.

For PLUS loans, the process retrieves some student details from the Person subsystem. You must ensure that student details are complete.

Prerequisites

Students are awarded funds, either automatically or manually.

For PLUS loan borrowers, ensure that the following fields are populated in the Person subsystem:

- License Number
- License State
- Citizenship Status - US Citizens
- *Citizenship - Permanent Residence
- State of Legal Residence
- State Residence since Date
- Alien Registration Number

If the borrower is a Permanent Resident, the Alien Registration Number and Document Number fields must be complete.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Loans - Create Stafford and PLUS Applications from Awards concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. You can create loan records for all or a single fund. Specify a value for the Fund Code parameter to create records for a particular fund. If you do not specify a value, the process creates loan records for all funds.
3. You can create loan records for all or a single award. Specify a value for the Award ID parameter to create records for a particular award. If you do not specify a value, the process creates loan records for all awards.
4. To set the parameters, refer to the following table.

The following table describes the parameters for the Loans - Create Stafford and PLUS Applications from Awards concurrent process.

Table 9–34 Loans - Create Stafford and PLUS Applications from Awards Parameters

Parameter	Description
Award Year	Select the award year for which loan is requested. This is a mandatory parameter.
Fund Code	Select the loan fund code.
Award ID	Select the award ID. The award ID is a unique identifier for each award. When you award funds automatically or manually, Oracle Student System assigns an ID to each award. The award ID is only used for internal processing.

9.6.5 Managing FFELP Loans

Managing FFELP loans involves:

- [Originating FFELP Loans](#)
- [Importing the EFT Roster Details](#)

To process FFELP loans, you interact with various external processors by electronically sending and receiving data in CommonLine 5 format. Educational institutions originate loans by sending loan records to the external processors. After processing the loan records, the external processor sends an acknowledgement to the institution. For more information, refer to [Originating FFELP Loans](#).

All external processors create a roster file containing loan disbursement details. The roster file includes information about only new and reissued loan disbursement dates and amounts. For more information, refer to [Importing the EFT Roster Details](#).

Each FFELP loan record is assigned a processing type value that is used by the external processor to determine the type of processing required for the record. The valid processing types are:

- Credit Only Response
- Credit and Print Request
- School certification request (return of application with certification data)
- Guarantee loans only
- Guarantee Loans (before Promissory Note) and print
- Print Promissory Note and Guarantee Loan (after receipt)

- Print application only

Currently, the Financial Aid subsystem only supports the Guarantee Loans (before Promissory Note) and print processing type.

9.6.5.1 Originating FFELP Loans

Originating FFELP loans involves:

- [Creating Loan Origination File](#)
- [Importing Origination Acknowledgement Details](#)

Creating Loan Origination File

You run the FFELP - Create Loan Origination File concurrent process to validate loan records and create the loan origination file. You send this file to the external processor, lender, or guarantor by using a transmission method of the institution's choice. This process performs the following tasks:

1. Picks up records from the origination table.
2. Checks if the loan records have a status of **Ready to Send**.
3. Derives the student key program from the current term record. If the term record does not exist, the process uses the key program assigned to the student program attempt.
4. Updates the disbursement fees based on the lender and corresponding fees defined during setup.
5. Updates the status of the records to **Sent**.
6. Generates an electronic flat file consisting of details of students awarded loans, if all validations are met.

A log file is generated if any validations fail. For information on viewing log files, refer to [Concurrent Process Procedures](#).

You send the flat file to the external processor. Before sending loan records to the external processor, you can validate the records for completeness. For more information, refer to [Validating Loan Data](#).

Note: For FFELP loans, disbursement details are sent along with the origination record.

Prerequisites

Loan records exist.

OPE ID for the organizational unit associated to the student's key program is defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the FFELP - Create Loan Origination File concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can include loan records for all or a single student. Specify a value for the Person Number parameter to create loan records for a single student.
3. You can include loan records for either PLUS or Stafford loans. Specify a value for the Loan Category parameter to include the appropriate records.
4. You can include loan records for a single record by specifying a value for the Loan ID parameter. The loan ID field is enabled only if you specify a value for the Person Number parameter. The values displayed depend on the award year and loan category selected for the student. If you do not specify a loan ID, the origination file includes all loan records for the specified loan category in the selected award year.
5. The school ID is not derived from the student in context. The process compares the school ID from the loan records (in the Loan ID) to the specified school ID and considers only the records where the two values match. For example, if you specify the Award Year, Loan Category, and School ID parameters, the process retrieves all student records for the specified award year with the selected loan category. For each record, the process compares the school ID from the record to the specified school ID. If the two school IDs match, the process includes the record in the file.
6. You can organize loan records based on a particular lender, guarantor, or servicer. To do this, specify a value for the Recipient ID parameter.
7. To set the parameters, refer to the following table.

The following table describes the parameters for the FFELP - Create Loan Origination File concurrent process.

Table 9–35 FFELP - Create Loan Origination File Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Select the person number.
Loan Category	Specify the loan type. Choose from Alternative Loan , FFELP - PLUS , or FFELP - Stafford . This is a mandatory parameter.
Loan ID	Select the loan ID from the list of values. The list only displays loan IDs of records with Ready To Send status. The external processor assigns a loan ID, a unique identifier, to each loan record. This field is enabled only if you specify a value for the Person Number parameter.
Media Type	Specify how to send the records to the processor. The specified media type is included in the header section of the file. Choose D to send the records on a diskette. Select T to send them on a magnetic tape. Choose M to use mainframe transmission. Select P to use Internet transmission. The default value for this parameter is P . This is a mandatory parameter.
Recipient ID	Select an option from the list of values. The list of values displays the lenders, guarantors, and servicers defined during setup.
School ID	Select the OPE ID of the educational institution or financial aid office from the list of values. If an educational institution is eligible and certified to participate in any Federal Student Aid (FSA) program, the U.S. Department of Education assigns an 8-digit unique identification number, known as OPE ID Number, to the institution. The institution uses the OPE ID while reporting data to the U.S. Department of Education. This is a mandatory parameter.
School Non Educational Branch ID	Select the School Non Educational Branch ID of the educational institution or financial aid office from the list of values. Some institutions and external agencies are assigned a non-educational branch ID that is defined during setup.

Importing Origination Acknowledgement Details

FFELP loan records are sent to external processors for approval. The processor makes changes, if any, to the records, and returns the records in the form of an acknowledgement file. The acknowledgement file confirms the receipt of the records. Run the FFELP - Upload Origination Acknowledgements request set to upload the flat file into Oracle Student System.

Note: You must run only one loan-related request set at a time. This is because the request sets use common internal tables.

For each record, the external processor updates multiple fields. The FFELP - Upload Origination Acknowledgements request set determines and updates the status of each record. This request set determines the record status by checking the values of the Guarantee Status, Lender Status, Promissory Note Status, and Credit Decision Status fields.

The request set updates the record status to **Accepted** if the following conditions are met:

- Guarantee Status is 20 or 40
- Lender Status is 45
- Promissory Note Status is 60
- Credit Decision Status is 5 or 35

You cannot modify the loan records that the external processor has accepted. For rejected records, evaluate the rejection reason and submit a new origination record to the external processor. For more information on evaluating rejected records, refer to [Validating Loan Data](#).

This request set derives the student key program from the current term record. If the term record does not exist, the request set uses the key program assigned to the student program attempt.

Prerequisites

The origination acknowledgement file is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the FFELP - Upload Origination Acknowledgements request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The FFELP - Upload Origination Acknowledgements request set consists of the following two concurrent processes:

- FFELP Loan Origination Acknowledgement - Loader: Loads the acknowledgement data from the flat file into a temporary table.
 - FFELP Loans Origination Acknowledgement - Process: Loads data from the temporary table into Oracle Student System.
2. The request set determines the award year for the loan records from the header record of the acknowledgement file.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the FFELP - Upload Origination Acknowledgements request set.

Table 9–36 FFELP - Upload Origination Acknowledgements Parameters

Parameter	Description
FFELP Loan Origination Acknowledgement - Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
FFELP Loans Origination Acknowledgement - Process concurrent process	NA
No parameters.	NA

9.6.5.2 Importing the EFT Roster Details

Run the FFELP - Upload Electronic Funds Transfer Roster request set to import the roster file generated by the external processor.

To check if any errors occurred while importing roster details, view the log file. For more information, refer to [Concurrent Process Procedures](#).

Prerequisites

The roster file is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the FFELP - Upload Electronic Funds Transfer Roster request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The FFELP - Upload Electronic Funds Transfer Roster request set consists of the following two concurrent processes:

- FFELP Loan Roster Acknowledgement - Loader: Loads the loan data from the flat file into a temporary table.
 - FFELP Loan Roster Acknowledgement - Process: Loads data from the temporary table into Oracle Student System.
2. The request set determines the award year for the loan records from the header record of the roster file.
 3. To set the parameters, refer to the following table.

The following table describes the parameters for the FFELP - Upload Electronic Funds Transfer Roster request set.

Table 9–37 FFELP - Upload Electronic Funds Transfer Roster Parameters

Parameter	Description
FFELP Loan Roster Acknowledgement - Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
FFELP Loan Roster Acknowledgement - Process concurrent process	NA
No parameters.	NA

9.6.6 Managing Direct Loans

Managing Direct Loans involves:

- [Originating Direct Loans](#)
- [Managing Direct Loan Change Origination](#)
- [Processing Direct Loan Promissory Notes](#)
- [Managing Direct Loan Disbursement](#)
- [Reconciling Direct Loan Data](#)

To originate Direct Loans, institutions report Direct Loan data to COD by sending loan origination records. Based on the accepted origination data, COD requests funds from the Department of Education. Origination also involves other activities, such as processing credit check decisions. For more information, refer to [Originating Direct Loans](#).

If student data changes after COD accepts the record, you create and submit a loan change record for the student. For more information, refer to [Managing Direct Loan Change Origination](#).

In addition to the origination process for Direct Loans, there is also processing of promissory notes. During setup, you define whether the institution or COD processes promissory notes for the students. For more information, refer to [Processing Direct Loan Promissory Notes](#).

Educational institutions report disbursement data to COD by sending loan disbursement records. For more information, refer to [Managing Direct Loan Disbursement](#).

As per the specifications for Direct Loans, educational institutions must reconcile the Direct Loan records at least monthly. For more information, refer to [Reconciling Direct Loan Data](#).

9.6.6.1 Originating Direct Loans

Managing Direct Loan origination involves:

- [Creating Loan Origination File](#)
- [Importing Origination Acknowledgement Details](#)
- [Uploading Credit Decision Acknowledgements](#)

Creating Loan Origination File

You run the Direct Loans - Create Loan Origination File concurrent process to validate loan records and create the loan origination file. You send this file to COD to report origination data. This process performs the following tasks:

1. Picks up records from the origination table, based on the specified parameters.
2. Checks if the loan records have a status of **Ready to Send**.
3. Derives the student key program from the current term record. If the term record does not exist, the process uses the key program assigned to the student program attempt.
4. Updates the status of the origination records to **Sent**.
5. Generates a flat file containing details of students awarded Direct Loans, if all validations are met.

A log file is generated if any validations fail. For information on viewing log files, refer to [Concurrent Process Procedures](#).

You send the file to COD. Before sending the file, you can validate the records for completeness. For more information, refer to [Validating Loan Data](#).

After sending loan origination records, you cannot modify them until COD acknowledges the records.

Prerequisites

Loan origination records exist.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Direct Loans - Create Loan Origination File concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can include loan records for either PLUS or Stafford loans. Specify a value for the Loan Category parameter to send the appropriate records.
3. You can originate loans for one or more records. To originate a particular record, specify a value in the Loan ID field. If you do not specify a value in the Loan ID field, the origination file includes all records of the specified loan category in the selected award year.
4. The process compares the school ID from the loan records (in the Loan ID field) to the school ID specified as the Direct Loan School Code parameter and considers only the records where the two values match.

5. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loans - Create Loan Origination File concurrent process.

Table 9–38 Direct Loans - Create Loan Origination File Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Loan Category	Specify the loan type. Choose either Direct Loan - PLUS or Direct Loan - Stafford . This is a mandatory parameter.
Loan ID	Select the loan ID from the list of values. The list only displays loan IDs of records with Ready To Send status.
Direct Loan School Code	Select the school code from the list of values. The list displays all the alternate IDs defined for the institution. During setup, you define the Direct Loan School Code as an alternate ID and assign it to an educational institution or a financial aid office. This is a mandatory parameter.

Importing Origination Acknowledgement Details

Direct Loan origination records are sent to COD for approval. COD makes changes, if any, to the records, and returns them to the educational institution in the form of an acknowledgement file.

The acknowledgement file confirms the receipt of the records. It also includes the loan values approved by COD and other data corrections, if any. Run the Direct Loan - Upload Origination Acknowledgements request set to upload the acknowledgement file into Oracle Student System.

For each record, COD updates the origination status. Based on the origination status value, the request set updates the record status. For Stafford loans, the request set updates the record status to **Accepted** if the origination status is A (Accepted). The record status is set to **Rejected** if the origination status is B (Rejected).

For PLUS loans, the request set updates the record status to **Accepted** if the origination status is X (Accepted) or C (Credit Accepted). The record status is set to **Rejected** if the origination status is B (Rejected) or D (Credit Denied).

If required, review and update the loan records either before or after COD accepts the record. If COD has not accepted the record, you update and resubmit the loan origination record. If COD has accepted the record, you create a loan change record. For more information, refer to [Managing Direct Loan Change Origination](#).

For rejected records, validate the record to determine the reason for rejection. For more information on validating records, refer to [Validating Loan Data](#). After addressing the rejection reason, modify and resubmit the record to COD.

Note: If a person's address does not have a Home and Resides At defined in Person Details, the loan origination process does not recognize the address, and the loan status is updated to **Not Ready**. You can click Reject Details in the Loan Details window to view the reason for loan rejection.

Prerequisites

The origination acknowledgement file is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the Direct Loan - Upload Origination Acknowledgements request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The Direct Loan - Upload Origination Acknowledgements request set consists of the following two concurrent processes:

- Direct Loan Origination Acknowledgement - Loader: Loads the acknowledgement data from the flat file into a temporary table.
 - Direct Loan Origination Acknowledgement - Process: Loads data from the temporary table into Oracle Student System.
2. The request set determines the award year for the loan records from the header record of the acknowledgement file.
 3. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Upload Origination Acknowledgements request set.

Table 9–39 Direct Loan - Upload Origination Acknowledgements Parameters

Parameter	Description
Direct Loan Origination Acknowledgement - Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
Direct Loan Origination Acknowledgement - Process concurrent process	NA
No parameters.	NA

Uploading Credit Decision Acknowledgements

If COD denies credit on a PLUS loan origination record, the borrower can request for a credit check or an override. The borrower needs to submit documentation when requesting for a credit check. If appropriate, COD overrides credit decisions after an initial denial. After the credit check, COD sends the updated credit decision to the educational institution in the form of a flat file.

You run the Direct Loan - Upload PLUS Credit Decision Override Note Acknowledgement request set to upload the credit decision acknowledgement file.

Prerequisites

The credit decision acknowledgement file is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the Direct Loan - Upload PLUS Credit Decision Override Note Acknowledgement request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The Direct Loan - Upload PLUS Credit Decision Override Note Acknowledgement request set consists of the following two concurrent processes:

- Direct Loan PLUS Credit Decision Override Acknowledgement - Loader:
Loads the acknowledgement data from the flat file into a temporary table.
 - Direct Loan PLUS Credit Decision Override Acknowledgement - Process:
Loads data from the temporary table into Oracle Student System.
2. The request set determines the award year for the loan records from the header record of the acknowledgement file.
 3. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Upload PLUS Credit Decision Override Note Acknowledgement request set.

Table 9–40 Direct Loan - Upload PLUS Credit Decision Override Note Acknowledgement Parameters

Parameter	Description
Direct Loan PLUS Credit Decision Override Acknowledgement - Loader concurrent process	NA
Data File	Enter the path and name of the flat file. This is a mandatory parameter.
Direct Loan PLUS Credit Decision Override Acknowledgement - Process concurrent process	NA
No parameters.	NA

9.6.6.2 Managing Direct Loan Change Origination

Managing Direct Loan change origination involves:

- [Modifying Origination Details](#)
- [Sending Changed Loan Records](#)
- [Uploading the Change Acknowledgement Records](#)

Modifying Origination Details

Consider a scenario in which the student award year or loan amount changes after the record is accepted by COD. In such cases, you create a loan change record and send it to COD.

Two statuses are associated with a modified Direct Loan record: loan status and loan change status. Loan status represents the record status. For accepted records, the loan status is set to **Accepted**. As the name suggests, loan change status represents the status of the loan change record.

Prerequisites

Origination acknowledgements are uploaded.

The loan record is accepted by COD.

Navigation

Financial Aid > Loan Processing > Loan Details

Steps

1. Query a record and select a Direct Loan row in the Loan Details region.
2. Click **Origination**. The Direct Loan Origination window displays the loan details.
3. Modify the loan record. You can only modify records with a loan status of **Ready to Send** or **Accepted**. For more information on modifying records, refer to [Viewing and Updating Direct Loan Origination Details](#).
4. Save your work.

Sending Changed Loan Records

After modifying the loan origination records, you send them to COD for approval. Run the Direct Loan - Create Change Origination File concurrent process to create a file including the changed loan records. This process performs the following tasks:

1. Picks up records from the origination table, based on the specified parameters.
2. Checks if the loan records have a loan status of **Accepted** and loan change status of **Ready to Send**.
3. Compares the student address from the origination record with the Primary Address in Person Details. If the two differ, the process includes the address change to the student change record.

4. Derives the student key program from the current term record. If the term record does not exist, the process uses the key program assigned to the student program attempt.
5. Identifies the modified details for each record.
6. Updates the loan change status of the records to **Sent**.
7. Generates a flat file containing details of the changed loan records, which you send to COD.

A log file is generated if any validations fail. For information on viewing log files, refer to [Concurrent Process Procedures](#).

Prerequisites

The loan records have a loan status of **Accepted** and loan change status of **Ready to Send**.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Direct Loan - Create Change Origination File concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can include PLUS or Stafford loan records in the change origination file. Specify a value for the Loan Category parameter to include the appropriate records.
3. The process compares the alternate ID of each student's organizational unit with the value specified for the Direct Loan School Code parameter and considers only the records where the two values match.
4. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Create Change Origination File concurrent process.

Table 9–41 Direct Loan - Create Change Origination File Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Loan Category	Specify the loan type. Choose either Direct Loan - PLUS or Direct Loan - Stafford . This is a mandatory parameter.
Direct Loan School Code	Select the school code from the list of values. This is a mandatory parameter.

Guidelines

If the student's Primary Address in the Person subsystem changes, a workflow is generated to notify the administrator. The Financial Aid Office must subscribe to the oracle.apps.ar.hz.PartySite.update business event to receive the change notification. For more information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For more information on creating workflows for business events, see *Oracle Workflow User's Guide*.

When you receive a change notification, review the existing student loan origination record, if any. If the record was previously submitted and accepted by COD, you must resubmit it. To do this, manually update the record status to **Ready to Send** and then execute the Direct Loan - Create Change Origination File concurrent process.

Uploading the Change Acknowledgement Records

After updated loan records are sent to COD for approval, COD verifies the records and sends them back in the form of an acknowledgement file.

The acknowledgement file confirms the receipt of the change records and includes other data corrections, if any. Run the Direct Loan - Upload Change Acknowledgments request set to upload the change acknowledgement records to Oracle Student System.

COD updates the status of each modified field of a record. The request set checks the status of each field to determine the record status. The record is considered rejected if one or more fields are rejected by COD.

Prerequisites

The change acknowledgement file is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the Direct Loan - Upload Change Acknowledgments request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The Direct Loan - Upload Change Acknowledgments request set consists of the following two concurrent processes:

- Direct Loan Change Acknowledgment - Loader: Loads the acknowledgement data from the flat file into a temporary table.
 - Direct Loan Change Acknowledgment - Process: Loads data from the temporary table into Oracle Student System.
2. The request set process determines the award year for the loan records from the header record of the acknowledgement file.
 3. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Upload Change Acknowledgments request set.

Table 9–42 Direct Loan - Upload Change Acknowledgments Parameters

Parameter	Description
Direct Loan Change Acknowledgment - Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
Direct Loan Change Acknowledgment - Process concurrent process	NA
No parameters.	NA

9.6.6.3 Processing Direct Loan Promissory Notes

Processing Direct Loans also involves processing *master promissory notes* and *manifests* for Direct Loans. A Master Promissory Note (MPN) is a promissory note

used to make one or more loans for one or more academic years. For Direct Loans, all promissory notes must be accompanied by a paper manifest that lists the borrower's name and identification number for each promissory note.

Promissory notes are completed by the borrower as part of the Direct Loan process. During setup, you specify the print location for the promissory note in the Direct Loan Setup window. The available print locations are:

- COD Prints (Return to School)
- COD Prints (Send to Borrower)
- COD Reprints (Send to Borrower)/COD Reprint
- COD Reprints and sends to school
- School prints

Either COD or the educational institution prints and processes promissory notes. The tasks that you perform to process promissory notes depend on whether COD or the institution processes promissory notes.

- If COD prints and processes promissory notes, the promissory notes are printed after the loan is **Accepted**. COD sends the **Accepted** or **Rejected** status of the note to the educational institution in the Promissory note acknowledgment file. If COD processes promissory notes, managing Direct Loan promissory notes for the institution involves:
 - [Importing Promissory Note Acknowledgement Details](#)
 - [Managing Master Promissory Note Details](#)
- If the educational institution chooses to process promissory notes, managing Direct Loan promissory notes involves:
 - [Creating Master Promissory Notes](#)
 - [Creating the Promissory Note Manifest](#)
 - [Importing Promissory Note Acknowledgement Details](#)
 - [Managing Master Promissory Note Details](#)

If the institution prints and processes promissory notes, you populate a table with the Master Promissory Note data elements. This table is used by the institution to print the MPNs. For more information, refer to [Creating Master Promissory Notes](#).

After generating an MPN, the MPN is signed by the student and you manually update the MPN status to **Signed**. After the status is updated, you create a manifest

for the signed MPNs. For more information, refer to [Creating the Promissory Note Manifest](#).

Regardless of whether the institution or COD processes the promissory notes, COD sends promissory note acknowledgements to the institution. You upload the acknowledgement details into Oracle Student System. For more information, refer to [Importing Promissory Note Acknowledgement Details](#).

You can view and update promissory note information. For more information, refer to [Managing Master Promissory Note Details](#).

Creating Master Promissory Notes

After a loan record is accepted by COD, update the promissory note status for the record to **Ready to Print**. If the institution prints and processes promissory notes, the administrator must manually update the status, after the record is accepted by COD.

Run the Direct Loan - Create Master Promissory Notes concurrent process to collect the data required to create MPNs for an award year.

This process performs the following tasks:

1. Selects the records based on the specified parameters.
2. Checks if the promissory notes have a status of **Ready to Print**. If not, the process skips the record.
3. Populates the Promissory Note table with the data.
4. Updates the status of the origination records to **Printed**.

You use data from the Promissory Note table to print notes in the required format. Next, you get the MPN signed by the borrowers.

On receipt of a signed promissory note, verify it for completeness and accuracy. If it is accurate, manually set the Promissory Note status to **Signed**.

Prerequisites

Loan origination records are accepted by COD.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

- 1. Run the Direct Loan - Create Master Promissory Notes concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
- 2. You can populate the interface table with MPN details for an individual student or all students in an award year. Specify a value for the Person Number parameter to create an MPN for a single student. If you do not specify a value for the Person number parameter, the process considers all students in the selected award year.
- 3. You can populate the interface table with MPN details for either PLUS or Stafford loans. Specify a value for the Loan Category parameter to create MPNs for the appropriate records.
- 4. You can populate the interface table with MPN details for one or more records. To create an MPN for a loan record, specify a value for the Loan ID parameter. If you do not specify a value for the Loan ID parameter, the process considers all records of the specified loan category.
- 5. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Create Master Promissory Notes concurrent process.

Table 9–43 Direct Loan - Create Master Promissory Notes Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Loan Category	Specify the loan type. Choose either Direct Loan - PLUS or Direct Loan - Stafford . This is a mandatory parameter.
Person Number	Select the person number.
Loan ID	Select the loan ID.

Creating the Promissory Note Manifest

A paper manifest must accompany all promissory notes. After promissory notes are signed and verified, you create the manifest that contains details including borrower name and identification number, for each signed promissory note. Run

the Direct Loan - Create Master Promissory Note Manifest concurrent process to collect the data required to create the manifest.

This process performs the following tasks:

1. Selects the loan records based on the specified parameters.
2. Checks if the promissory notes have a status of **Signed**.
3. Populates the Direct Loan Manifest table.
4. Updates the promissory note status for the records to **Manifested**.

You use data from the Direct Loan Manifest table to print a report in the required format. The report is mailed to COD with the corresponding signed MPNs.

Prerequisites

Promissory notes are signed.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Direct Loan - Create Master Promissory Note Manifest concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can populate the interface table with details for an individual student or all students in an award year. Specify a value for the Person Number parameter to create the manifest for a single student. If you do not specify a value for the Person Number parameter, the process considers all students in the selected award year.
3. You can populate the interface table with details for either PLUS or Stafford loans. Enter a value for the Loan Category parameter to create the manifest for the appropriate records.
4. You can populate the interface table with details for one or more records. To create the manifest for a loan record, specify a value for the Loan ID parameter. If you do not specify a value for the Loan ID parameter, the process considers all records of the specified loan category.
5. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Create Master Promissory Note Manifest concurrent process.

Table 9–44 Direct Loan - Create Master Promissory Note Manifest Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Loan Category	Specify the loan type. Choose either Direct Loan - PLUS or Direct Loan - Stafford . This is a mandatory parameter.
Person Number	Select the person number.
Loan ID	Select the loan ID.

Importing Promissory Note Acknowledgement Details

After the promissory note is printed, manifest is created, and sent to COD with the MPNs, COD sends an acknowledgment file to the institution. The file contains the promissory note status and other details.

After you receive the promissory note acknowledgement flat file from the COD, run the Direct Loan - Upload Master Promissory Note Acknowledgment request set. This request set performs the following tasks:

- 1. Loads the acknowledgement file.
- 2. Validates the promissory note data.
- 3. Updates the promissory note status of the loan origination or loan change record.

If the institution printed the promissory note and created the manifest, the request set triggers a workflow for rejected records. For more information, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For more information on creating workflows for business events, see *Oracle Workflow User’s Guide*.

The workflow sends a notification to the administrator including details, such as Student SSN, Student Name, Award Year, Loan Number, and Reject Reasons. The administrator reviews and corrects the promissory note and can resubmit it either manually or automatically. To manually resubmit the promissory note for printing and manifesting, change the Promissory Note status of the record to **Ready to Print**.

Alternatively, the administrator can reply to the notification mail to automatically set the Promissory Note status of the record to **Ready to Print**.

Prerequisites

The acknowledgement file is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the Direct Loan - Upload Master Promissory Note Acknowledgment request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The Direct Loan - Upload Master Promissory Note Acknowledgment request set consists of the following two concurrent processes:

- Direct Loan Master Promissory Note Acknowledgment - Loader: Loads the acknowledgement data from the flat file into a temporary table.
 - Direct Loan Master Promissory Note Acknowledgment Process: Loads data from the temporary table into Oracle Student System.
2. The request set determines the award year for the loan records from the header record of the acknowledgement file.
 3. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Upload Master Promissory Note Acknowledgment request set.

Table 9–45 Direct Loan - Upload Master Promissory Note Acknowledgment Parameters

Parameter	Description
Direct Loan Master Promissory Note Acknowledgment - Loader concurrent process	NA
Data File	Enter the path and name of the flat file. This is a mandatory parameter.

Table 9–45 (Cont.) Direct Loan - Upload Master Promissory Note Acknowledgment Parameters

Parameter	Description
Direct Loan Master Promissory Note Acknowledgment Process concurrent process	NA
No parameters.	NA

Managing Master Promissory Note Details

You can view and update information related to promissory notes.

Navigation

Financial Aid > Loan Processing > Loan Details

Steps

- 1. Query a record and select a Direct subsidized or unsubsidized loan.
- 2. Click **Origination**. The Direct Loan Origination window displays the loan details.
- 3. Select the Master Promissory Note tab to view the promissory note details.
- 4. Optionally, update the promissory note status. You can update information only for loan records with **Ready** or **Not Ready** statuses.
- 5. Optionally, click **Status History**. The Promissory Note Status History window displays historical data related to the note status and reject codes. The Master Promissory Note Statuses region lists the previous note statuses with respective dates. The Reject Codes region lists the reject codes and their descriptions for the note, if any.

When origination records are created, the value of promissory note status defaults to **Not Ready**.

- 6. Save your work.

9.6.6.4 Managing Direct Loan Disbursement

Managing Direct Loan disbursement involves:

- [Sending Disbursement Details](#)

- [Uploading Disbursement Acknowledgement Details](#)

Sending Disbursement Details

After COD approves the original or changed origination record, you run the Direct Loan - Create Disbursement Send File concurrent process to validate disbursement records and create a file containing the records.

This process performs the following tasks:

1. Picks up records from the disbursement table.
2. Checks if the loan origination record has a status of **Accepted**.
3. Updates the status of the loan disbursement records to **Sent**.
4. Generates a flat file containing loan disbursement details that you send to COD.

To view the flat file, click View Output in the Submit Request window. A log file is generated if any validations fail. For more information, refer to [Concurrent Process Procedures](#).

Prerequisites

Loan origination records are accepted by COD.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Direct Loan - Create Disbursement Send File concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. The process compares the alternate ID of each student's organizational unit with the value specified for the Direct Loan School Code parameter and considers only the records where the two values match.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Create Disbursement Send File concurrent process.

Table 9–46 Direct Loan - Create Disbursement Send File Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Direct Loan School Code	Select the school code from the list of values. This is a mandatory parameter.

Uploading Disbursement Acknowledgement Details

After you send disbursement records, COD processes the details and returns the records after validation in the form of an acknowledgement file. The acknowledgement file confirms the receipt of the disbursement records. Run the Direct Loan - Upload Disbursement Acknowledgements request set to upload acknowledgement details into Oracle Student System.

This process determines and updates the record status based on the status specified in the acknowledgment file. For each record, COD updates the record status. If the status field is blank, the record status is set to **Accepted**. If the status field contains a value, the record status is set to **Rejected**. For rejected records, review, update, and resubmit the records. For more information, refer to [Validating Loan Data](#).

Prerequisites

The acknowledgement file is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

1. Run the Direct Loan - Upload Disbursement Acknowledgements request set.
For information on running the request set, see [Concurrent Process Procedures](#).
The Direct Loan - Upload Disbursement Acknowledgements request set consists of the following two concurrent processes:
 - Direct Loan Disbursement Acknowledgement - Loader: Loads the acknowledgement data from the flat file into a temporary table.
 - Direct Loan Disbursement Acknowledgement - Process: Loads data from the temporary table into Oracle Student System.

2. The request set determines the award year for the loan records from the header record of the acknowledgement file.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Upload Disbursement Acknowledgements request set.

Table 9–47 Direct Loan - Upload Disbursement Acknowledgements Parameters

Parameter	Description
Direct Loan Disbursement Acknowledgement - Loader concurrent process	NA
Data File with path	Enter the path and name of the flat file. This is a mandatory parameter.
Direct Loan Disbursement Acknowledgement - Process concurrent process	NA
No parameters.	NA

9.6.6.5 Reconciling Direct Loan Data

Reconciling Direct Loan data involves:

- [Uploading Loan Disbursement Details](#)
- [Comparing COD and Oracle Student System Data](#)

To help institutions reconcile data, COD sends year-to-date reconciliation data in the form of the *School Account Statement - Direct Loan (SAS-DL)* report. The details are uploaded into Oracle Student System. For more information, refer to [Uploading Loan Disbursement Details](#).

You can generate a report on the differences, if any, between the existing disbursement details and details received from COD. For more information, refer to [Comparing COD and Oracle Student System Data](#).

Uploading Loan Disbursement Details

Educational institutions use the SAS-DL report to reconcile COD loan data with the educational institution loan data.

The SAS-DL report contains multiple sections. Currently, the Financial Aid subsystem allows you to import details only from the following two sections:

- Section II contains monthly and YTD summary data. You can upload the YTD summary information by running the Direct Loan - Upload Reconciliation Year-to-Date Summary request set. The monthly summary data is not imported to Oracle Student System.
- Section VII contains loan details and disbursement activity level records data. To upload data from Section VII, run the Direct Loan - Upload Reconciliation Year-to-Date Detail request set.

Prerequisites

The file containing loan data is received.

Navigation

Requests > Concurrent Manager > Requests > Run > Request Set

Steps

To upload a summary of the loan data:

1. Run the Direct Loan - Upload Reconciliation Year-to-Date Summary request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The Direct Loan - Upload Reconciliation Year-to-Date Summary request set consists of the following two concurrent processes:

- Direct Loan Reconciliation YTD Summary Loader: Loads the loan data from the flat file into a temporary table.
 - Direct Loan Reconciliation YTD Summary Process: Loads data from the temporary table into Oracle Student System.
2. The request set compares the school ID from the loan records (in the Loan ID field) to the school ID specified as the Direct Loan School Code parameter and considers only the records where the two values match.
 3. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Upload Reconciliation Year-to-Date Summary request set.

Table 9–48 Direct Loan - Upload Reconciliation Year-to-Date Summary Parameters

Parameter	Description
Direct Loan Reconciliation YTD Summary Loader concurrent process	NA
Data File	Enter the path and name of the flat file. This is a mandatory parameter.
Direct Loan Reconciliation YTD Summary Process concurrent process	NA
Award Year	Select the award year. This is a mandatory parameter.
Direct Loan School Code	Select the school code from the list of values. This is a mandatory parameter.

To upload details of the loan data:

1. Run the Direct Loan - Upload Reconciliation Year-to-Date Detail request set.

For information on running the request set, see [Concurrent Process Procedures](#).

The Direct Loan - Upload Reconciliation Year-to-Date Detail request set consists of the following two concurrent processes:

- Direct Loan Reconciliation YTD Detail Loader: Loads the loan data from the flat file into a temporary table.
 - Direct Loan Reconciliation YTD Detail Process: Loads data from the temporary table into Oracle Student System.
2. The request set compares the school ID from the loan records (in the Loan ID field) to the school ID specified as the Direct Loan School Code parameter and considers only the records where the two values match.
 3. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Upload Reconciliation Year-to-Date Detail request set.

Table 9–49 Direct Loan - Upload Reconciliation Year-to-Date Detail Parameters

Parameter	Description
Direct Loan Reconciliation YTD Detail Loader concurrent process	NA
Data File	Enter the path and name of the flat file. This is a mandatory parameter.
Direct Loan Reconciliation YTD Detail Process concurrent process	NA
Award Year	Select the award year. This is a mandatory parameter.
Direct Loan School Code	Select the school code from the list of values. This is a mandatory parameter.

Comparing COD and Oracle Student System Data

You can compare disbursement details received from COD with existing details in Oracle Student System to address the differences, if any, between the details. You can compare disbursement details only if YTD loan details are imported.

Run the Direct Loan - Create Reconciliation Report concurrent process to compare data that is uploaded from COD with the data in Oracle Student System for Direct Loans and generate a file that captures the differences for reconciliation.

Prerequisites

- The disbursement acknowledgement file is uploaded.
- The Direct Loan - Upload Reconciliation Year-to-Date Detail request set is run.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Direct Loan - Create Reconciliation Report concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, refer to the following table.

The following table describes the parameters for the Direct Loan - Create Reconciliation Report concurrent process.

Table 9–50 Direct Loan - Create Reconciliation Report Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Person Number	Select the person number.

9.6.7 Managing Loan Data

Managing loan data involves:

- [Viewing and Updating FFELP Loan Origination Details](#)
- [Viewing and Updating Direct Loan Origination Details](#)
- [Viewing Correspondence Details](#)
- [Viewing and Updating Loan Disbursement Details](#)

While processing loans, you view and update loan origination details for both FFELP and Direct Loans.

The following table describes the statuses an FFELP or Direct Loan origination record can have at any time.

Table 9–51 Loan Origination Record Statuses

Status	Indicates That
Not Ready	The loan origination record is incomplete. You must validate the record and address the errors before you can send it.
Ready To Send	The loan origination record is complete. You can send it to the external processor or COD.

Table 9–51 (Cont.) Loan Origination Record Statuses

Status	Indicates That
Suspended	Although the loan origination record is complete, the administrator has withheld it due to some reason. If you do not want to send a completed record, change the record status from Ready To Send to Suspended .
Sent	The loan origination record is sent to the external processor or COD.
Accepted	The loan origination record is accepted by COD. A record has an Accepted status only after you run the Direct Loan - Upload Origination Acknowledgment or FFELP - Upload Origination Acknowledgment concurrent process.
Rejected	COD or the external processor has rejected the origination record. Change the record status to Ready To Send after correcting the record.
Terminated	The borrower has terminated the loan.
Canceled	The loan application is rejected.

For more information on viewing and updating loan origination details, refer to [Viewing and Updating FFELP Loan Origination Details](#) or [Viewing and Updating Direct Loan Origination Details](#).

The Financial Aid subsystem tracks the correspondence details for each student. For more information, refer to [Viewing Correspondence Details](#).

You view and update loan disbursement details for both FFELP and Direct Loans. For more information, refer to [Viewing and Updating Loan Disbursement Details](#).

9.6.7.1 Viewing and Updating FFELP Loan Origination Details

After creating FFELP loan records, you can review and update the records. However, you cannot modify an FFELP loan record after it is accepted by the external processor.

Prerequisites

Loan records exist.

Navigation

Financial Aid > Loan Processing > Loan Details

Steps

- 1. Query a record.

2. Select a row representing an FFELP loan.
3. To edit the effective dates for the loan, modify the dates in the From and To fields.
4. To update the loan status, select an option from the Loan Status list of values.
Note: The Loan Change Status field is available only for Direct Loans.
5. If, for any reason, you do not want the application to process a record, deselect the Active check box associated with the record. The application ignores the record during processing.
6. Click **Origination**. The FFELP/Alternative Loan Origination window displays the loan details. You can perform multiple tasks in this window.
7. Refer to the following table to view information in the window.

The following table describes the tasks you can perform to view FFELP loan origination details.

Table 9–52 Viewing FFELP Loan Origination Details

Information	Perform the Following Tasks
Loan details	View the information in the Loan Details tab.
Lender details	View the information in the Lender Details region in the Loan Details tab.
Promissory note information	View the information in the Loan Details tab.
Student details	View the information in the Student region of the Borrower Details tab.
Verify if the student electronically signed the promissory note	<p>Verify if the Electronic Signature check box in the Student region of the Borrower Details tab is selected. If yes, the student has electronically signed the promissory note.</p> <p>The Electronic Signature check box displays the correct value only after the promissory note acknowledgement file is uploaded.</p> <p>The Electronic Signature check box is read-only.</p>
PLUS or Alternative loan borrower information	View the information in the PLUS/Alternative region of the Borrower Details tab.
Borrower details	View the information in the Borrower region of the Borrower Details tab. The borrower region applies to the actual borrower. For example, in case of Stafford loans this region applies to the student. However, for PLUS loans this region applies to the parent.

Table 9–52 (Cont.) Viewing FFELP Loan Origination Details

Information	Perform the Following Tasks
Verify if the borrower electronically signed the promissory note	Verify if the Electronic Signature check box in the Borrower region of the Borrower Details tab is selected. If yes, the borrower has electronically signed the promissory note. The Electronic Signature check box displays the correct value only after the promissory note acknowledgement file is uploaded. The Electronic Signature check box is read-only.
Loan status details	View the information in Loan Status tab. This tab displays the current status of the loan. The fields on this tab are populated only after the loan origination record is acknowledged. All fields on the tab are read-only.

8. Refer to the following table to update information in the window. You cannot modify records that are accepted by the external processor. You can only modify records with **Ready** or **Not Ready** statuses.

The following table describes the tasks you can perform to update FFELP loan origination details.

Table 9–53 Updating FFELP Loan Origination Details

Information	Perform the Following Tasks
Processing Type	Select an option from the Processing Type list of values in the Loan Details tab. The external processor checks this field to verify the type of processing required for the application. Currently, the Financial Aid subsystem supports only the Guarantee Loans (before Promissory Note) and print processing type.

Table 9–53 (Cont.) Updating FFELP Loan Origination Details

Information	Perform the Following Tasks
Record type	<p>Select a value from the Record Type list of values in the Loan Details tab. The external processor checks this field to verify the type of application contained in the flat file.</p> <p>The value that you can specify in the Record Type field depend on the value selected in the Processing Type field.</p> <p>For the Guarantee Loans (before Promissory Note) and print processing type value, the Record Type field can contain the following values:</p> <ul style="list-style-type: none"> ■ New application - Choose this value to indicate the first submission of an application. ■ Correction application - Choose this value to resubmit the record for processing. ■ Reprint - Choose this value to reprint the application. ■ Terminate - Choose this value to request for a loan withdrawal. You can only withdraw a loan prior to guarantee. After the loan is guaranteed you need to cancel the loan by sending the Change Transaction Send File. Currently, the Financial Aid subsystem does not support cancellation of guaranteed loans.
Lender details	<p>Select an option from the Lender Relationship Code list of values in the Loan Details tab.</p> <p>In the Lender Details region, you can only update the Lender Relationship Code. All the other fields are read-only.</p> <p>When you select a value, the Lender Details region is populated. The list displays the relationships defined in the Lender Relationship window during setup.</p>
Delivery method for the promissory note	<p>Select a value from the Promissory Note Delivery list of values in the Loan Details tab.</p> <p>You can choose from E-mail, Paper, and Web.</p>
Student Program completion date	<p>Specify the anticipated date the student will complete the program at the institution in the Anticipated Completion field in the Borrower Details tab.</p>
Student defaulter status	<p>Specify a value for the Default/Refund Status field in the Student region to specify the student status.</p> <p>Select Yes to indicate that the student is currently a defaulter on a student loan or owes a refund on a federal grant. If not, choose No.</p> <p>Choose Overridden by the School to indicate that the defaulter status of the borrower is overridden by the educational institution.</p> <p>If you set the defaulter status to Yes, the loan record is not originated.</p>

Table 9–53 (Cont.) Updating FFELP Loan Origination Details

Information	Perform the Following Tasks
Student signature	Select Yes or No . Choose Yes to indicate that the student has signed the promissory note. You can manually update this field. Alternatively, the field is updated after you import the promissory note acknowledgement file.
PLUS or Alternative loan borrower	Select a borrower from the Borrower list of values in the PLUS/Alternative region. The list displays all the relationships for the selected student.
PLUS or Alternative loan borrower defaulter status	<p>Specify a value for the Default/Refund Status field in the PLUS/Alternative region to specify the borrower status.</p> <p>Select Yes to indicate that the borrower is currently a defaulter on a student loan or owes a refund on a federal grant. If not, choose No.</p> <p>Choose Overridden by the School to indicate that the defaulter status of the borrower is overridden by the educational institution.</p> <p>If you set the defaulter status for the PLUS/ Alternative loan borrower to Yes, the loan record is not originated.</p>
PLUS or Alternative loan borrower signature	Select Yes or No . Choose Yes to indicate that the borrower has signed the promissory note. You can manually update this field. Alternatively, the field is updated after you import the promissory note acknowledgement file.
Borrower outstanding loan	<p>As the name suggests, the borrower region applies to the actual borrower. For example, in case of Stafford loans this region applies to the student. However, for PLUS loans this region applies to the parent.</p> <p>Specify a value for the Outstanding Loan field in the Borrower region to indicate if the borrower has any outstanding loans. Select Yes to indicate that the borrower has an outstanding Stafford, PLUS, or Consolidation loan disbursed before July 1, 1993. If not, choose No.</p>
Whether the borrower pays interest	The Interest Indicator check box indicates how the borrower pays interest. Select the check box to indicate that the borrower will pay the interest on the unsubsidized Federal Stafford or Federal PLUS loan while in school and during the grace or deferment period.
Whether the borrower authorized a credit check	<p>The Credit Authorization check box indicates if the borrower authorized a credit check.</p> <p>Select the check box to indicate that the sending organization has obtained the borrower's authorization to perform a credit check.</p> <p>This data is required for preapproval credit processing.</p> <p>In most cases, institutions consider a signed Federal PLUS loan promissory note as authorization to perform a credit check.</p>

9.6.7.2 Viewing and Updating Direct Loan Origination Details

After creating loan records, you can review and update them, if required. However, the educational institution must communicate all changes to COD by sending updated records.

Prerequisites

Loan records exist.

Navigation

Financial Aid > Loan Processing > Loan Details

Steps

1. Query a record.
2. Select a Direct Loan.
3. To edit the effective loan dates, modify the dates in the From and To fields.
4. To update the loan status, select an option from the Loan Status list of values.
5. To update the loan change status, select an option from the Loan Change Status list of values.
6. If, for any reason, you do not want the application to process a record, deselect the Active check box associated with the record. The application ignores the record during processing.
7. Click **Origination**. The Direct Loan Origination window displays the loan details.
8. To view origination-related details, select the Origination tab.
9. To view MPN details, select the Master Promissory Note tab.
10. To view parent details for PLUS loans, select the Parent Loan tab. This tab is enabled only for PLUS loans.
11. Refer to the following table to update appropriate loan details. You cannot modify records sent to COD. You can only modify records with **Ready to Send** or **Not Ready** statuses.

The following table describes the tasks you can perform to update Direct Loan origination details.

Table 9–54 Updating Direct Loan Origination Details

To Update	Perform the Following
Student defaulter status	<p>Specify a value for the Student Default Status field in the Origination tab.</p> <p>Select Yes to indicate that the student is currently a defaulter on a student loan or owes a refund on a federal grant, else choose No. Choose Overridden by the School to indicate that the defaulter status of the student is overridden by the educational institution.</p>
Whether the dependent student is eligible for additional unsubsidized loans	<p>Specify Yes in the Additional Unsubsidized Eligibility for Dependent Student field.</p> <p>By default, this field contains a blank value.</p>
Student eligibility for additional health profession unsubsidized loans	<p>Specify Yes in the Additional Unsubsidized Eligibility for Health Professionals field.</p> <p>By default, this field contains a blank value.</p>
Promissory note print setting	<p>Select an option from the Print Indicator list of values.</p> <p>For the 2003-04 award year, the COD Reprints and sends to school option is not available.</p>
Master Promissory Note information	<p>Refer to Managing Master Promissory Note Details.</p>
Parent or borrower for PLUS loans	<p>Select an option from the Borrower list of values in the Parent Loan tab. The list displays all the relationships for the selected student.</p> <p>When you specify a borrower, the other fields are populated with the borrower details.</p>
Borrower defaulter status for PLUS loans	<p>Specify a value for the Default Status field in the Parent Loan tab.</p> <p>Select Yes to indicate that the student is currently a defaulter on a student loan or owes a refund on a federal grant, else choose No. Choose Overridden by the School to indicate that the defaulter status of the status is overridden by the educational institution.</p>

9.6.7.3 Viewing Correspondence Details

For each student, you can view the history of written communication between the institution and student.

Prerequisites

Loan records exist.

Navigation

Financial Aid > Loan Processing > Loan Details

Additional Notes

Click **Correspondence History** to open the Correspondence Interaction History window. This window displays correspondence details for the selected student. For more information about the Correspondence Interaction History window, refer to [Viewing Correspondence Interaction History](#) in Correspondence.

9.6.7.4 Viewing and Updating Loan Disbursement Details

You can view and update disbursement details related to Direct and FFLEP loans. For more information, refer to [Viewing and Modifying Disbursement Details](#).

9.6.8 Validating Loan Data

You can validate Direct and FFLEP loan data at different stages to ensure that the data is complete and accurate. For rejected records, you can validate the records, correct the loan records, and resend them to COD or the external processor.

Validate FFLEP loan data at the following stages:

- Before sending loan records to the external processor, validate the records for completeness.
- After receiving acknowledgements from the external processor, evaluate the rejected records to address the errors.
- After modifying loan data, validate the records for accuracy and completeness.

Validate Direct Loan data at the following stages:

- Before sending origination records to COD, validate the records for completeness.
- After receiving origination acknowledgements from COD, evaluate the rejected records to address the errors.
- After modifying loan data, validate the records for accuracy and completeness.

Prerequisites

Loan records exist.

Navigation

Financial Aid > Loan Processing > Loan Details

Steps

1. Query a record and select a Direct Loan.
2. Click **Origination**. The window displayed depends on the selected record. For Direct Loans, the Direct Loan Origination window displays the loan details. For FFELP loans, the FFELP/Alternative Loan Origination window is displayed.
3. Click **Validate** to verify the loan details.
4. Click **Reject Details**. The Reject Details window displays any errors or discrepancies found during the validation process. The window lists the field name and the cause for each error. For rejected records this window lists the reason for the rejection of the record.
5. Edit the required fields in the loan record and save your work.

9.6.9 Generating Disbursement Letters

Run the Financial Aid - Loan Disbursement Letter concurrent process to generate loan disbursement letters for a particular student or a list of students.

You can only generate one letter per disbursement for a student after the awarded amount has been disbursed and credited to the student's account. You can generate letters only for open award years.

Prerequisites

Before you send letters to students or borrowers, ensure that correspondence details, such as e-mail ID are specified in the Person subsystem.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Financial Aid - Loan Disbursement Letter concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. To specify the Person Group, use either static or dynamic person ID groups.

3. To set the parameters, refer to the following table.

The following table describes the parameters for the Financial Aid - Loan Disbursement Letter concurrent process.

Table 9–55 Financial Aid - Loan Disbursement Letter Parameters

Parameter	Description
Document Name	Select a predefined letter format. This is a mandatory parameter.
Selection Criteria	Specify the criteria for selecting the students. Choose G to send the letter to a group of students or S to send the letter to a single student. This is a mandatory parameter.
Person ID Group	Select the person group.
Person Number	Select the person number.
Delivery Type	Select the delivery method. The delivery methods available are: <ul style="list-style-type: none"> ■ E-MAIL ■ E-MAIL/FAX ■ E-MAIL/FAX/PRINT ■ E-MAIL/PRINT ■ FAX ■ FAX/PRINT ■ PRINT This is a mandatory parameter.
Printer Name	If the selected delivery type includes PRINT, specify the path and name of the printer.
Fax Number	If the selected delivery type includes FAX, specify the fax number of the student.
Award Year	Select the award year. This is a mandatory parameter.

9.6.10 Disbursing Loans

After COD acknowledges loan disbursement records, you disburse the loan amount. For information about disbursing loans, refer to [Disbursing Awards](#).

9.7 Managing Student Employment

9.7.1 Overview

Student employment through the work study program is another form of financial aid. The Federal Work Study (FWS) program provides job opportunities to undergraduate and graduate students both on and off campus. If a student is awarded FWS, strict federal regulations and procedures are applied to disburse and track funds.

Student employment administration is shared between the Financial Aid office and employment or career services office. The Financial Aid office and employer use the Oracle Human Resource/Payroll system or an external payroll system to exchange data and track student and payroll details. Managing student employment involves:

- [Managing Job Listings](#)
- [Administering Work Study Programs](#)
- [Viewing and Updating Employment Details](#)

9.7.2 Managing Job Listings

To facilitate assigning jobs to students, you define and manage the jobs available for each organizational unit. The Student External and Internal Jobs window serves as a repository of jobs, which the administrator uses to assign jobs to students.

Prerequisites

Organizational units are set up.

Navigation

Financial Aid > Student Employment > Student External and Internal Jobs

Steps

1. Query for the appropriate organizational unit. The jobs associated with the selected organizational unit are displayed.
2. Optionally, click **Organizational Details** to view details of the selected organizational unit.
3. Select a row in the Job Listings region.

4. Click **File > New**. A new row is added.
5. Enter a unique identifier for the job in the Job Code field.
6. Enter a short description for the job in the Description field.
7. The Work Location field is a free-form text field. You can enter any information related to the job in this field. For example, you can specify whether the job is an on- or off-campus job.

Note: To indicate that a job is unavailable, select the Closed check box associated with the job.

8. Optionally, specify the following details in the Summary tab:
 - Enter the name of person to be contacted to apply for the job in the Supervisor Contact field.
 - Enter the telephone number of hiring supervisor in the Contact Number field.
 - Specify the pay range for the job in the Pay Range fields.
 - Enter the start date for the job in the Work Start Date field.
 - Enter a detailed description of the job in the Job Description field.
 - Select the Job Location and Development check box to indicate that the job was developed under the Job Location and Development Program.
 - Select the Paid by Off Campus Employer check box to indicate that the off-campus employer processes pay for the student.
9. Optionally, specify the following details in the Details tab.
 - Select the Help America Read Position check box to indicate that the job qualifies as a Help America Read position. For jobs that qualify as Help America Read positions, the government share can be higher.
 - Enter the skills required for the job in the Skills Required field.
 - Select the Community Service Position check box to indicate that the job qualifies as a Community Service position. For jobs that qualify as Community Service, the government share can be higher.
 - Specify the objective of the job in the Educational Objective field.
10. Save your work.

9.7.3 Administering Work Study Programs

Administering work study programs involves:

- [Creating the Work Authorization File](#)
- [Uploading Payroll Information](#)

9.7.3.1 Creating the Work Authorization File

After work study is awarded, you communicate the student employment details to the employer. To do this, you populate an interface table with student employment details. Employers can pick up the disbursement and student details from the interface table by using a Human Resource/Payroll system.

To populate the interface table, you create a work authorization file for each planned disbursement. The number of work authorization files for a student equal the number of disbursements for the student. Each work authorization file tracks the amount awarded to the student in a term. If the student award details change, you must recreate the work authorization file.

You can create work authorization files automatically or manually. To automatically create a work authorization file, run the Student Employment - Create Work Authorization File concurrent process. You manually create a work authorization file by using the Student Work Award Progress window.

Prerequisites

Student Employment setup is complete.

Funds are awarded to students.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Financial Aid > Student Employment > Student Work Award Progress

Steps

To automatically create work authorization files:

1. Run the Student Employment - Create Work Authorization File concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. You can populate the interface table with work authorization details for an award year or for a load calendar within the award year. Specify a value for the Load Calendar parameter to create the work authorization file for a particular load calendar.
3. You can populate the interface table with work authorization details for all employment funds or a single fund. Specify a value for the Fund Code parameter to create the work authorization file for a particular fund.
4. You can populate the interface table with work authorization details for all students in an award year or for a single student. Specify a value for the Person Number parameter to create the work authorization file for a particular student.
5. To set the parameters, refer to the following table.

The following table describes the parameters for the Student Employment - Create Work Authorization File concurrent process.

Table 9–56 Student Employment - Create Work Authorization File Parameters

Parameter	Description
Award Year	Specify the award year. This is a mandatory parameter.
Load Calendar	Select the load calendar in the award year.
Fund Code	Select the fund.
Person Number	Specify the person number.

To manually create a work authorization file for a student:

1. Query the record. The Student Work Award Progress window displays the student employment details.
2. Select a row in the Work Study Details region. Each row in this region is associated to a disbursement.
3. Click **Create Work Authorization**. The application validates student details and creates a work authorization file, if all conditions are met. You need to requery the record to view the modifications. After the work authorization file is created, the ID and Date fields are populated.
4. Save your work.

9.7.3.2 Uploading Payroll Information

Employers send the details of student payments to the educational institution. The amount paid by the employer is adjusted against the award amount accepted by the student for the award year. Every time payroll information is successfully uploaded, the remaining amount is reduced. If the paid amount exceeds the accepted amount, the payment is rejected.

Educational institutions receive payment details through an interface table or other means, such as a letter. You can automatically import payment details from the interface table to Oracle Student System by running the Student Employment - Upload Payroll Information concurrent process. To update payment details sent through other means, manually enter the information in the Student Work Award Details window.

During setup, you define a notification limit either as a percentage or value for each work study fund. When the student compensation is approaching the defined notification limit, the Student Employment - Upload Payroll Information concurrent process initiates a workflow. The workflow checks the notification details for the fund awarded to the student. If the limit is reached or crossed, it triggers a notification to inform the student and employer. For more information on workflows, see Appendix B, Workflow in *Oracle Student System Implementation and Administration Guide*. For information on creating workflows for business events, see *Oracle Workflow User's Guide*.

Prerequisites

The payment details are received.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Financial Aid > Student Employment > Student Work Award Progress

Steps

To automatically import payment details:

1. Run the Student Employment - Upload Payroll Information concurrent process.
For information on running the concurrent process, see [Concurrent Process Procedures](#).
2. You can import payment details for a single record or all the records in a batch. Specify a value for the Authorization ID parameter to import payment details for a single record.

3. To set the parameters, refer to the following table.

The following table describes the parameters for the Student Employment - Upload Payroll Information concurrent process.

Table 9–57 Student Employment - Upload Payroll Information Parameters

Parameter	Description
Batch ID	Select the batch ID. This is a mandatory parameter.
Authorization ID	Select the authorization ID for which payroll information is to be uploaded.
Validation Level	Select Yes or No . If you set the value to Yes , the process compares the organization unit code from the payroll information to the code defined in Oracle Student System. The process imports only the records where the two values match.

To manually update payment details for a student:

1. Query the record. The Student Work Award Progress window displays the student employment details.
2. Select a row in the Payment Details region. Each row in this region is associated to a disbursement.
3. Enter the number of work hours in the Hours Worked field.
4. Enter the amount in the Paid Amount field.
5. Specify the date in the Paid Date field.
6. The Pay Source field is read-only. It indicates whether the payment details are entered manually or automatically.
7. Save your work.

9.7.4 Viewing and Updating Employment Details

You can view and update student employment details in the Student Work Award Progress window.

Prerequisites

Funds are awarded to students.

Navigation

Financial Aid > Student Employment > Student Work Award Progress

Steps

1. Query a record. The top-most region of the window displays student details, such as SSN, Full Name, Award Year, Effective Dates, and Active ISIR. The fields in this region are read-only.

If disbursement holds exist for the selected student, the text *Holds Exist* is displayed on the top-right corner of the Student Work Award Progress window.
2. Refer to the following table to view the appropriate information in the window.

The following table describes the tasks you can perform to view student employment details.

Table 9–58 Viewing Student Employment Details

To View	Perform the Following
Details of the employment fund awarded to the student	View the information in the Fund Details region. This section also displays the award ID associated with the record. The fields in the Fund Details region are read-only.
Work study details	View the information in the Work Study Details region. This region displays the following details: <ul style="list-style-type: none">■ The terms for the award in the Term field. One or more terms are associated with an award.■ The term-wise amount details in the Offered Amount, Accepted Amount, Remaining Amount, and Earned Till Date fields.■ The percentage of the total amount paid till date against the accepted amount in the Progress Towards Limit % field.
Work authorization file details	View the information in the Work Authorization region. This region displays the ID of the work authorization file and the date on which the file was generated in the ID and Date fields, respectively. Work Authorization details for a term are populated only if the work authorization file for the term exists.

Table 9–58 (Cont.) Viewing Student Employment Details

To View	Perform the Following
Whether the threshold limit notification is sent to the student and employer	View the information in the Limit Notification region for the term. Verify if the Sent check box is selected. If yes, a notification was sent on the date specified in the Date field.
Work authorization file history for a term	<ol style="list-style-type: none"> 1. Select the row for the term in the Work Study Details region. 2. Click View Authorization History. The View Authorization History window displays student, award, and fund information. The Authorization History region displays the work period, authorization file, and threshold details. All the fields in this window are read-only. The View Authorization History button is enabled only if a work authorization file exists of the term. 3. Close the window to return to the Student work award Progress window.
Payroll details for a term	Select the row for the term in the Work Study Details region and view in the corresponding information in the Payroll Details region.

3. Refer to the following table to update information in the window.

The following table describes the tasks you can perform to update student employment details.

Table 9–59 Updating Student Employment Details

To Update	Perform the Following
Offered and accepted amount for a term	<ol style="list-style-type: none"> 1. Select the row for the term in the Work Study Details region. 2. Enter the offered amount in the Offered Amount field. 3. Specify the accepted amount in the Accepted Amount field. 4. Save your work.
Create or recreate the work authorization file	Refer to Creating the Work Authorization File .
Payroll details	Refer to Uploading Payroll Information .

9.8 Managing Sponsorships

A student can receive financial aid in the form of sponsorships. A sponsor can undertake to pay all or a portion of a student's tuition and fees, for specific terms.

Although sponsorships are a form of financial aid, the Sponsorships functionality is primarily contained in the Student Finance subsystem. The process for managing sponsorships is detailed in the Student Finance chapter. For more information, refer to [Administering Student Sponsorships](#) in Student Finance.

9.9 Disbursing Awards

9.9.1 Overview

Disbursing awards to students involves:

- [Processing Disbursement Records](#)
- [Viewing and Modifying Disbursement Details](#)
- [Transferring Disbursement Details to Student Finance](#)

9.9.2 Processing Disbursement Records

You can process disbursement records either manually or automatically. You can manually process one record at a time by using Online Disbursement button in the Pell Disbursements, FFELP Disbursements, Direct Loan Disbursements, and General Disbursements windows. To automatically process multiple records, run the Awards - Disbursements - Process Records concurrent process.

The Awards - Disbursements - Process Records concurrent process evaluates disbursement records and identifies awards that are ready to be passed to the Student Finance subsystem to be credited to the student account. This process picks up records that meet the following criteria:

- Transaction type is **Planned**.
- Current date is greater than or equal to the disbursement date.
- Award status is **Accepted**.
- Fund awarded to the student can be disbursed based on Fund Manager attributes.
- No disbursement holds exist for the student.

For each record, the process performs the validations listed in the following [Validations](#) section. If a record fails any check, the process skips the record and inserts a message in the log file. For information on viewing log files, refer to [Concurrent Process Procedures](#).

If all conditions are satisfied and the disbursement date is reached, the process sets the transaction type to **Actual** and populates a Student Finance table.

The process re-evaluates records with Actual transaction type to check if the eligibility for disbursements is maintained. The process checks if the Verification Enforcement Date is reached for the records. If the date is reached and eligibility validations are not satisfied for the records, the disbursements are cancelled and adjustment detail records are created to reverse the initial disbursements.

Validations

For each record, the Awards - Disbursements - Process Records concurrent process performs the following checks and validations.

- Checks and validations for all fund types:
 - Checks if a value is specified for the No NSLDS History Disbursement Date Offset field for the fund. If yes, the process performs the following:
 - * Verifies whether students have NSLDS history. The process does not disburse to students without an NSLDS history, such as first-time borrowers.
 - * Verifies if the date offset has been reached. If the date has been reached or past, the process disburses the funds if all other checks are met.
 - Checks if the Application Process Status field on the student's financial aid base record is **Application Complete**. An **Application Complete** status indicates that all the required To Do Items associated with the fund are completed by the student.
 - Checks if the student has the required attendance type or sufficient credit points based on the eligibility criteria defined. The process does not perform any eligibility validations if attendance type or cumulative credit point requirements are not defined in the Disbursement Details window or through the award distribution plan assignment.
 - If the awarded fund has associated Pays Only programs, the process checks if the student is enrolled in at least one Pays Only program with **Active** program attempt status.

- Derives student enrollment details, such as key program and attendance type, from the current term record. If a term record does not exist, the process uses the details associated with the student's program attempt.
- Checks and validations for Direct and FFELP loans:
 - Checks student eligibility for the loan.
 - The loan status is **Active**.
 - If origination is required for the loan, the process checks if the loan record is accepted by COD or the external processor.
 - For FFELP loans, the process checks if fund receiving is a requirement. If yes, the process verifies if the fund status is **Funded**.
- Checks and validations for Pell Grant:
 - Checks student eligibility for Pell Grant.
 - Validates if the Awarding ISIR record for the student is set as the Payment ISIR record.
 - Validates the Pell disbursement based on the Pell awarding logic and status of the Lock award field.
 - If Pell origination is a requirement, the process checks if the origination record is accepted by COD.
 - If Pell disbursement is a requirement, the process checks if the disbursement record is accepted by COD.

Prerequisites

Students are awarded funds.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Financial Aid > Student Awards > Student Awards

Steps

To automatically process disbursement records:

1. Run the Awards - Disbursements - Process Records concurrent process.

For information on running the concurrent process, see [Concurrent Process Procedures](#).

2. You can run the process for a fund, person group, or a single person by specifying the appropriate value for the Run For parameter.
3. To set the parameters, refer to the following table.

The following table describes the parameters for the Awards - Disbursements - Process Records concurrent process.

Table 9–60 Awards - Disbursements - Process Records Parameters

Parameter	Description
Award Year	Select the award year. This is a mandatory parameter.
Run For	Specify the run criterion. You can choose one of the following values: <ul style="list-style-type: none"> ■ F to run the process for the fund specified in the Fund Code parameter. ■ P to run the process for a person group specified in the Person ID Group parameter. ■ S to run the process for a student specified in the Person Number parameter. This is a mandatory parameter.
Person ID Group	Select the person ID group if you set the Run For parameter to P .
Person Number	Select the person number if you set the Run For parameter to S .
Fund Code	Specify the fund code if you set the Run For parameter to F .
Log Detail	Select Yes or No . If you choose Yes , the process generates a detailed log file.

To manually process a disbursement record:

1. Query a record in the Student Awards window.
2. Select a record and term.
3. Click **Disbursement Details**. The appropriate Disbursements window displays award and disbursement details for the student for the term.
4. Select the disbursement row in the Disbursement Details region.
5. Click **Online Disbursement** to invoke the Awards - Disbursements - Process Records concurrent process for the record. This process evaluates the

disbursement record and updates the transaction type for the record from **Planned** to **Actual**, if the record meets all the validations. For records that fail the validations, you can choose to override the validations if necessary.

After the transaction type for a disbursement record is set to **Actual**, you cannot update the Disbursement Date, Teaching Period, Cumulative Credit Points, Min Attendance Type, Expiration Date, and Hold for the record.

6. Optionally, to forcefully update the transaction type, select the Force check box for the disbursement and click **Online Disbursement**.

Note: The Force check box is available only for records with **Planned** transaction type.

7. Save your work.

9.9.3 Viewing and Modifying Disbursement Details

Viewing and modifying disbursement details involves:

- [Updating Pell Grant Disbursement Details](#)
- [Updating FFELP Loan Disbursement Details](#)
- [Updating Direct Loan Disbursement Details](#)
- [Updating Disbursement Details for Other Funds](#)
- [Assigning and Releasing Disbursement Holds](#)
- [Viewing Disbursement Activity Details](#)

9.9.3.1 Updating Pell Grant Disbursement Details

COD rejects disbursement records if student data is incomplete. In such cases, you need to update the disbursement records and resend them to COD. You can review and update disbursement records by using the Pell Disbursements window.

You can access the Pell Disbursements window from the Student Awards or Pell Origination windows. The Pell Disbursements window is read-only when opened from the Pell Origination window. To update disbursement details, ensure that you open the Pell Disbursements window from the Student Awards window.

Prerequisites

Pell disbursement records exist for students.

Navigation

Financial Aid > Student Awards > Student Awards

Steps

- 1. Query a record, select a Pell Grant record, and click **Disbursement Details**. The Pell Disbursements window displays details of the selected student.
- 2. Optionally, check if the Pell Alternate Schedule check box is selected. If yes, the Pell alternate schedule is used to award Pell Grant to the selected student.

By default, the General tab is displayed. The General tab displays generic disbursement-related information. The fields in the General tab are the same as those in the Disbursement Details region of the General Disbursements window. For more information, refer to [Updating Disbursement Details for Other Funds](#).

In the Pell Disbursement window, the General tab includes an additional Pell-specific field, Pell Attendance Type. This field displays the attendance type used to award Pell Grant to the student. You can update the attendance type before processing the record. You cannot modify the attendance type for records with **Actual** transaction type.

The Pell tab displays Pell Grant-specific disbursement details.

- 3. Refer to the following table to perform the appropriate task in the Pell tab. Most of the fields in this tab are read-only that are updated when you import the origination and disbursement acknowledgement files. You can update only the Acknowledgement Status and Db/Cr fields.

You cannot modify disbursement records sent to COD. You can only modify records with **Ready** or **Not Ready** status.

The following table lists the tasks you can perform in the Pell tab.

Table 9–61 Performing Tasks in the Pell Tab

To	Perform the Following Steps
View or update the disbursement record status	Use the Acknowledgement Status field. To update the status, select an option from the Acknowledgement Status list of values.
View the disbursement date	Use the Disbursement Date field.
View the accepted amount for the disbursement record	Use the Amount field.

Table 9–61 (Cont.) Performing Tasks in the Pell Tab

To	Perform the Following Steps
View or update if the disbursement amount is a planned credit or debit in the student account	<p>Use the Db/Cr field for the record. Choose P to indicate that the disbursement amount is a planned credit. Alternatively, choose N to indicate that the disbursement amount is a planned debit.</p> <p>You can set the disbursement amount as planned credit only if the Disburse to Student Account check box is selected in the Fund Manager.</p>
View the date on which the disbursement record is acknowledged by COD	Use the Acknowledgement Status Date field.
View the date on which the disbursement record was processed	Use the Process Date field.
View the date on which the payment period for the record begins	Use the Payment Period Start Date field.
View the Batch ID for the record	Use the Batch ID field for the record.
View the COD accepted disbursement date	Use the Accepted Disbursement Date field.
View the COD accepted amount	Use the Accepted Amount field for the record.
View the COD accepted planned credit or debit value	Use the Accepted Db/Cr field for the record. A value of P indicates that COD approved the disbursement amount as a planned credit. A value of N indicates that COD approved the disbursement amount as a planned debit.
View the COD accepted date on which the payment period for the record begins	Use the Accepted Payment Period Start Date field.
View the total amount that has been disbursed to the student till date	Use the Year To Date Amount field for the record.
View the edit or reject code for a disbursement record, if any	Check if the Edit Code field is populated. Use the code value to determine the reason for correction or rejection.

Table 9–61 (Cont.) Performing Tasks in the Pell Tab

To	Perform the Following Steps
View the rectification flag for a record, if any	In some cases, institutions must take immediate action when COD modifies records. In such cases, COD sets a flag on the record to inform the institution of the required action. Use the Rectification Flag field for the record.

9.9.3.2 Updating FFELP Loan Disbursement Details

You can view and update FFELP loan disbursement information by using the FFELP Disbursements window. However, you cannot update disbursement information after FFELP loan records are accepted by the external processor.

You can access the FFELP Disbursements window from the Student Awards or FFELP/Alternative Loan Origination windows. The FFELP Disbursements window is read-only when opened from the FFELP/Alternative Loan Origination window. To update disbursement details, ensure that you open the FFELP Disbursements window from the Student Awards window.

Prerequisites

Loan records exist for students.

Navigation

Financial Aid > Student Awards > Student Awards

Steps

1. Query a record, select an FFELP record, and click **Disbursement Details**. The FFELP Disbursements window displays details of the selected student.

By default, the General tab is displayed in the FFELP Disbursements window. The General tab displays generic disbursement-related information. The fields in the General tab are the same as those in the Disbursement Details region of the General Disbursements window. For more information on the fields in the General tab, refer to [Updating Disbursement Details for Other Funds](#).

The FFELP tab displays loan-specific disbursement details.
2. Refer to the following table to perform the appropriate task in the FFELP tab. You cannot modify records with **Sent** status.

The following table lists the tasks you can perform in the FFELP tab.

Table 9–62 Performing Tasks in the FFELP Tab

To	Perform the Following
View the internal ID for the disbursement record	<p>Use the Disbursement Number field.</p> <p>The disbursement records are assigned numbers sequentially based on the disbursement dates. If you create a disbursement record between two existing records, the disbursement numbers are reassigned based on the disbursement dates.</p>
View the transaction type for the disbursement record	Use the Transaction Type field.
Update the transaction type	The transaction type for a disbursement record is updated after you process the record. For more information on processing disbursement records, refer to Processing Disbursement Records .
View or update the status of the disbursement record	Use the Disbursement Status field. This field is updated after you import the disbursement roster file. You can also manually update this field.
View the date on which the record status was last updated	Use the Disbursement Status Date field. This is a read-only field.
View the net amount for the disbursement record	<p>Use the Net Amount field. This field displays the amount issued to the student in the selected disbursement record. This is a read-only field. The application calculates the Net Amount value based on the following formula:</p> $\text{Net disbursement amount} = \text{Gross disbursement amount} - (\text{Origination fee} + \text{Guarantee fee})$
View or update the origination fee to be paid by the student	Use the Origination Fee field. The value in this field is calculated based on the gross amount for the student. If required, you can update the value manually.
View or update the origination fee paid by the student till date	Use the Origination Fee Paid field. The value in this field is updated after you import the FFELP origination acknowledgement or disbursement roster file. You can also manually update this field.
View or update the guarantee fee to be paid by the student	Use the Guarantee Fee field. The value in this field is calculated based on the gross amount for the student. If required, you can update the value manually.
View or update the guarantee fee paid by the student till date	Use the Guarantee Fee Paid field. This field is updated based on whether the disbursement is funded or not. You can also manually update this field.

Table 9–62 (Cont.) Performing Tasks in the FFELP Tab

To	Perform the Following
View or update the fund status	Use the Fund Status field. This field is updated after you import the FFELP origination acknowledgement or disbursement roster file. You can also manually update this field.
View the date on which the fund status was last updated	Use the Fund Status Date field. This is a read-only field.
View or update the method used to release the funds to the educational institution or student	Use the Fund Disbursement Method field. The field is updated after you import the disbursement roster file. You can also manually update this field.
View or update the check number	Use the Check Number field. This field displays the identification number associated with the check, if any, used for the disbursement. The field is updated after you import the disbursement roster file. You can also manually update this field.
View the date on which the funds are released to the educational institution	Use the Fund Release Date field. This is a read-only field. The field is updated after you import the disbursement roster file.
View or update disbursement hold status	The Hold Release Indicator field is populated based on the information reported to the external agency. This field is updated after you import the FFELP origination acknowledgement or disbursement roster file. You can also manually update this field.
Verify or specify if the record was reported on a previous disbursement	Use the Previously Reported Indicator field. The field is updated after you import the disbursement roster file. You can also manually update this field.
View or specify if the disbursement is a late disbursement	Use the Late Disbursement field. This check box is selected for late disbursements. A disbursement is considered a late disbursement if it is issued after the earlier of the following dates: <ul style="list-style-type: none"> ■ End date for the loan period ■ Borrower's last date of at least half-time enrollment

9.9.3.3 Updating Direct Loan Disbursement Details

For rejected disbursement records, you need to update the disbursement records and resend them to COD. You can view and modify Direct Loan disbursement information in the Direct Loan Disbursements window.

You can access the Direct Loan Disbursements window from the Student Awards or Direct Loan Origination windows. The Direct Loan Disbursements window is read-only when opened from the Direct Loan Origination window. To update disbursement details, ensure that you open the Direct Loan Disbursements window from the Student Awards window.

Prerequisites

Loan records exist for students.

Navigation

Financial Aid > Student Awards > Student Awards

Steps

1. Query a record, select a Direct Loan record, and click **Disbursement Details**. The Direct Loan Disbursements window displays details of the selected student.

By default, the Direct Loan Disbursements window displays the General tab. The General tab displays generic disbursement-related information. The fields in the General tab are the same as those in the Disbursement Details region of the General Disbursements window. For more information on the fields in the General tab, refer to [Updating Disbursement Details for Other Funds](#).

The Direct Loan tab displays Direct Loan-specific disbursement details.

2. Refer to the following table to perform the appropriate task in the Direct Loan tab. You cannot modify a record if the loan status or loan change status is **Sent**.

The following table lists the tasks you can perform in the Direct Loan tab.

Table 9–63 Performing Tasks in the Direct Loan Tab

To	Perform the Following
View the internal ID for the disbursement record	Use the Disbursement Number field. The disbursement records are assigned numbers sequentially based on the disbursement dates. If you create a disbursement record between two existing records, the disbursement numbers are reassigned based on the disbursement dates.
View the transaction type for the disbursement	Use the Transaction Type field.
Update the transaction type	The transaction type for a disbursement record is updated after you process the record. For more information on processing disbursement records, refer to Processing Disbursement Records .
View the amount issued to the student in the selected disbursement record	Use the Net Amount field. This is a read-only field. The application calculates the Net Amount value based on the following formula: <i>Net disbursement amount = Gross disbursement amount - Origination fee</i>
View or update the origination fee to be paid by the student	Use the Origination Fee field. The value in this field is calculated based on the gross amount for the student. If required, you can update the value.
View the interest rebate amount for the disbursement	Use the Interest Rebate field. This is a read-only field. The application calculates the interest rebate amount based on the following formula: <i>Interest rebate amount = Net disbursement amount - (Gross disbursement amount - Loan fee)</i>
View or update the student confirmation information	The Affirmation Flag field indicates if the disbursement has been confirmed by the student. If yes, the value for this field is set to Yes . This field is updated after you import the origination acknowledgement or the disbursement acknowledgement file. You can also manually update this field.

9.9.3.4 Updating Disbursement Details for Other Funds

The General Disbursements window displays the disbursement details for all fund types, except Pell Grant, Direct Loans, FFELP loans, and work study.

For Pell Grant, FFELP loans, and Direct Loans the Disbursement Details region of the General Disbursements window appears as the General tab in the Pell Disbursements, FFELP Disbursements, and Direct Loan Disbursements windows.

Using the General Disbursements window, you add disbursements for a fund already awarded to a student.

Prerequisites

Loan records exist.

Student is awarded funds.

Navigation

Financial Aid > Student Awards > Student Awards

Steps

- 1. Query a record.
- 2. Select a row representing a fund other than Pell Grant, Direct Loan, work study, or FFELP loan.
- 3. Click **Disbursement Details**. The General Disbursements window is displayed. The top-most region displays student details and the Fund Details region displays fund details.
- 4. Refer to the following table to perform the appropriate task in the Disbursement Details region.

The following table lists the tasks you can perform in the Disbursement Details region.

Table 9–64 Performing Tasks in the Disbursement Details Region

To	Perform the Following
View the internal ID for the disbursement record	Use the Disbursement Number field. The disbursement records are assigned numbers sequentially based on the disbursement dates. If you create a disbursement record between two existing records, the disbursement numbers are reassigned based on the disbursement dates.
View the transaction type for the disbursement record	Use the Transaction Type field.

Table 9–64 (Cont.) Performing Tasks in the Disbursement Details Region

To	Perform the Following
Update the transaction type	The transaction type for a disbursement record is updated after you process the record. For more information on processing disbursement records, refer to Processing Disbursement Records .
View or update the teaching calendar associated with the disbursement record	Use the Teaching Calendar field. To update the value, select an option from the Teaching Calendar list of values. You cannot update the teaching period for a record with Actual transaction type.
View or update the disbursement date for the record	Use the Disbursement Date field. To update the date, specify the date in the Disbursement Date field. You cannot update the disbursement date for a record with Actual transaction type.
View or update the amount offered to the student	Use the Offered Amount field. To update the value, enter a new value in the Offered Amount field. You can update the Offered Amount only for records with Actual or Planned transaction type.
View or update the amount accepted by the student	Use the Accepted Amount field. To update the value, enter a new value in the Accepted Amount field. You can update the Accepted Amount only for records with Actual or Planned transaction type.
View the amount paid to the student	Use the Paid Amount field. This is a read-only field that is updated after the record is processed. For more information on processing disbursement records, refer to Processing Disbursement Records .
View the eligibility status for the disbursement record	Use the Status field. This is a read-only field that is updated after the record is processed. For more information on processing disbursement records, refer to Processing Disbursement Records . For records that meet all validations, the eligibility status is set to Processed . If you forcefully process a record, the eligibility status is set to Forced .
View the date on which the record was last processed	Use the Date field. This is a read-only field that is updated each time the record is processed.

Table 9–64 (Cont.) Performing Tasks in the Disbursement Details Region

To	Perform the Following
View or update the credit points or minimum attendance type required for the disbursement	<p>The Cumulative Credit Points and Min Attendance Type fields are mutually exclusive. Either of these fields is populated based on the setting for the distribution plan associated with the fund.</p> <p>During setup, you specify the credit points or attendance type required a the fund in the Award Distribution Plans window. If specified, the credit points or attendance type is an eligibility criteria for the fund. If you do not specify either, these fields are blank.</p> <p>You can specify or update the credit points or minimum attendance type by entering values in the appropriate fields. You cannot update the credit points or attendance type for a record with Actual transaction type.</p>
View or specify the date after which the disbursement expires	<p>Use the Expiration Date field. The application calculates the expiration date based on the disbursement date and specified expiration time period. During setup, you specify the expiration time period in the Disbursement Expiration Offset field for a fund in the Fund Manager window.</p> <p>The Expiration Date field is blank if you do not specify a value for the Disbursement Expiration Offset field during setup.</p> <p>If required, you can update the expiration date for a disbursement record. You can only update the expiration date for records with Planned transaction type.</p>
View or update the verification enforcement date	<p>Use the Enforcement Date field. During setup, you specify the enforcement date in the Verification Enforcement Date Offset field for a fund in the Fund Manager window.</p> <p>If specified, the application uses this date as an offset for verification of actual disbursement against enrollment and Pays Only validations. If you do not specify a value during setup, the Enforcement Date field for the record is blank.</p> <p>If required, you can manually set or update the expiration date for a disbursement record.</p>
Specify or update the award revision reason	<p>Use the Revision Code field. When you update a record, you can specify the reason for the update by using this field.</p> <p>The list of values for this field displays the revision reasons defined in the Award Revision Reasons window during setup.</p>

Table 9–64 (Cont.) Performing Tasks in the Disbursement Details Region

To	Perform the Following
Check if the disbursement is a planned credit	Verify if the Include As Planned Credit check box is selected. If yes, the disbursement amount is included as planned credit. The setting to include the disbursement amount as planned credit is specified for a fund in the Fund Manger window during setup.
Check if holds exist for the student	Verify if the Hold check box is selected. If yes, holds exist for the student. Before disbursing the fund, you must release the holds. For more information on releasing holds, refer to Assigning and Releasing Disbursement Holds .
View disbursement activity details	You can view disbursement activity details only for records with Actual transaction type. For more information, refer to Viewing Disbursement Activity Details .

9.9.3.5 Assigning and Releasing Disbursement Holds

The Disbursement Holds window is displayed when you click the **Holds** button in the Pell Disbursements, FFELP Disbursements, Direct Loan Disbursements, and General Disbursements windows. Using the Disbursement Holds window, you can assign or release disbursement holds.

Navigation

General Disbursements > Holds

Pell Disbursements > Holds

FFELP Disbursements > Holds

Direct Loan Disbursements > Holds

Steps

1. Click **Holds**. The Disbursement Holds window displays the details of the holds associated with a student, if any.
2. To assign a hold to a student:
 1. Select an option from the Holds list of values. The Date field is automatically populated.
 2. Save your work.
3. To release an assigned hold:

1. Select the row representing the hold in the Holds region.
2. Select the Released check box associated with the hold. A decision box asking you to confirm if the hold should be released is displayed. Click **Yes**.
3. Optionally, specify the reason for the release in the Reason for Release field.
4. Optionally, specify the release date in the Date field.
5. Save your work.

9.9.3.6 Viewing Disbursement Activity Details

You open the Disbursement Activity window by clicking the **Disbursement Activity** button. The Disbursement Activity window is only available for records with **Actual** transaction type.

Prerequisites

Transaction type for record is **Actual**.

Navigation

General Disbursements > Disbursement Activity

Pell Disbursements > Disbursement Activity

FFELP Disbursements > Disbursement Activity

Direct Loan Disbursements > Disbursement Activity

Additional Notes

You can view the details of the selected disbursement record in the Disbursement Activity window. All fields in this window are read-only. This window includes three tabs: General, Direct Loan, and Invoice Details. The Direct Loan tab is enabled only when you access this window from the Direct Loan Disbursements window. When accessed from other windows, this tab is disabled.

9.9.4 Transferring Disbursement Details to Student Finance

The Awards - Disbursements - Transfer to Student Accounts concurrent process is used to collect the eligible disbursement records and update student accounts under the Student Finance subsystem. Typically, the Student Finance office transfers records from the Financial Aid to Student Finance subsystem. However, Oracle Student System provides institutions the flexibility to allow either office to perform the task. The Awards - Disbursements - Transfer to Student Accounts

concurrent process is detailed in the Student Finance chapter. For more information, refer to [Administering Student Sponsorships](#) in Student Finance.

9.10 Tracking Satisfactory Academic Progress

During setup, student academic performance requirements and criteria are defined as progression rules in the Academic Records subsystem based on the institution's policy. Progression rules help institutions to monitor and evaluate student performance. Using Oracle Student System, you can define two types of progression rules, general and application-specific. General rules are predefined progression rules that can be used by an institution or organizational unit. Institutions can also define application-specific rules for a program type, version, or organizational unit. For more information on defining progression rules, see the *Oracle Student System Implementation and Administration Guide*.

One or more outcomes are associated with each progression rule. The outcomes associated with the rules are applied when the Academic Records administrator assesses SAP by validating student data against the defined progression rules. Typically, SAP is assessed periodically and at least once in an academic year. The administrator can apply progression rules and outcomes automatically and manually. For more information on applying rules and outcomes and reviewing student performance status, refer to [Applying Progression Rules and Outcomes](#) in Academic Records.

Any in-progress financial aid application or undisbursed awards can be affected by the results of an assessment. If the student does not meet the performance requirements, the outcomes associated with the progression rules are applied to the student. With regard to financial aid, outcomes are usually awarding or disbursement holds for a single or all funds. The awarding and disbursement concurrent processes in the Financial Aid subsystem check for holds, if any, associated with a student. Based on the type of hold, if any exists, the fund is not awarded or disbursed to the student. For more information on the awarding and disbursement concurrent processes, refer to [Processing Awards](#) and [Disbursing Awards](#).

Student Recruiting

Oracle Student System integrates with the Oracle Sales and Marketing products to provide both *targeted* and *one-to-one* marketing for prospective students, creating a powerful student recruiting tool.

10.1 Overview

Using the functionality available in the Oracle Sales and Marketing products, recruiters can:

- Execute recruiting campaigns through multiple channels
- Fulfill requests for information
- Develop targeted lists
- Create personalized marketing messages
- Maintain deadlines
- Organize on or off campus events

Because all interactions between prospects and the educational institution are maintained in a single repository, you have access to information collected through other recruitment and marketing efforts. You can view notes from discussions with a prospect, access program and personal interests, and use event registration tools.

By leveraging information from each interaction, recruiters and staff focus on meeting prospective student needs. Personalized communications leads to increased admission yield rates, applicant satisfaction, and eventual retention.

Refer to the *Oracle Student System Implementation and Administration Guide* and the Oracle Marketing and Sales documentation for further product and implementation information.

The Person subsystem manages person related data and interfaces with other subsystems. Person records are used in Admissions, Enrollment, Student Finance, Financial Aid, and Academic Records.

This chapter details the following topics:

- [What's New in this Release](#)
- [Person Overview](#)
- [Person Details](#)
- [Person International Details](#)
- [Person Holds](#)
- [Tracking](#)

11.1 What's New in this Release

In this release, Oracle Student System has the following new and modified features:

- [Tracking](#)
- [Person Details](#)
- [Residency/Citizenship Details](#)
- [Person Address](#)
- [Business Events and Workflows](#)
- [Business Views](#)
- [Self-Service](#)

- [Impact of Oracle Trading Community Architecture](#)

11.1.1 Tracking

In the current release, two new tracking step types are added. These tracking steps types include:

- Transcript-Partial-Unofficial
- Transcript-Final-Unofficial

11.1.2 Person Details

In the current release, information on residency, citizenship, and funding statuses are collected through the Residency/Citizenship Details window.

11.1.3 Residency/Citizenship Details

The Person International window is renamed to Residency/Citizenship window. This window includes the following tabs:

- [Residency tab](#) (New tab)
- [Citizenship Tab](#) (Existing tab)
- [Funding Tab](#) (Existing tab)

11.1.3.1 Residency tab

The new Residency tab in the Residency/Citizenship Details window contains the following fields:

- Residency Class
- Residency Status
- State of Residence
- Country of Residence
- Evaluation Date
- Evaluator
- Effective From Date
- Effective To Date

These fields are shifted from the Residency tab in the Person Details window to the Residency tab in the Residency/Citizenship window.

In addition, the following validations are added to the residency class attribute:

- The comment and descriptive flexfields are now moved to the residency class/status record level. The comment field will be accessed through the new Residency/Citizenship Details window.
- The Add History button is now associated with each Residency class record.
- Residency Class can only be inserted when creating a new person record and becomes a view-only record once saved.
- Residency Class is now unique. Once a residency class is created, you cannot modify the residency class as it might have serious implications on the fee assessment and the financial aid processes.
- Residency Status, Evaluation Date, Evaluator, Effective From Date and Effective To Date can be updated.
- A record is created in the Residency History window and the Residency History table each time one of the following fields are updated.
 - Residency Status
 - Evaluation Date
 - Evaluator
 - Effective From Date
 - Effective To Date
 - Comment
 - Descriptive Flexfields
- A Residency record cannot be deleted.

The residency status validations also apply to Admission Import Process for the Source Category of Residency Details.

For more information on Admission Import Process for the Source Category of Residency Details, see [Importing Admission Information](#), Admissions.

11.1.3.2 Citizenship Tab

The following changes are made to the Citizenship tab:

- The City and Country of Birth fields are removed and moved to the Biographic tab in the Person Details window.
- The Citizenship/Residence fields, such as the Status, Effective Start Date, and Effective End Date fields are moved to the Citizenship tab from the Demographics tab of the Person Statistics window. The Demographics tab is no longer available in the Person Statistics window.

11.1.3.3 Funding Tab

The following changes are made to the Funding tab:

- A Notes field is added to the Funding tab in the Residency/Citizenship Details window. Previously, this field was not displayed in the Person International Funding tab but on the Person Details Funding tab.
- The Funding tab in the Residency/Citizenship window contains the same fields including the Fund Source, Name, Amount, Relationship, and Doc Received fields as in the Funding tab of the Person Details window.

11.1.4 Business Events and Workflows

In the current release, two new business events are introduced.

- Residency Status
- Address Creation/Update

A business event is raised when a residency status/class or address is updated. The Residency Change workflow is modified to include the new Residency validations.

When a residency record is inserted or updated, following the new Residency validations, a business event is raised. If the Residency fields, such as the residency status, evaluation date, evaluator, effective from date, or effective to date are modified, the updated value(s) is displayed and the previous value is placed into the Residency History table.

The current Address Change workflow notification will be subscribed from a business event rather than directly triggered when an address change occurs.

For more information, see Appendix B, *Workflow in Oracle Student System Implementation and Administration Guide*. For information on creating workflows for business events, see *Oracle Workflow Guide*.

11.1.5 Business Views

In this release, business views are available for person entities in Oracle Student System. Administrators can use both basic and full business views provided by Oracle Student System to query person details.

For more information on Business Views, see *Oracle Student System Open Interfaces User Guide*.

11.1.6 Self-Service

The current version of Oracle Student System allows you to create dynamic as well as static person ID groups through self-service pages. For dynamic person ID groups, you must have Oracle Student System Administrator Self-Service responsibility and Oracle Discoverer installed. You can also search and select workbooks as part of this enhancement.

11.1.7 Person Address

The current version of Oracle Trading Community Architecture obsoletes the start and end date associated with person address information when the address expires. To resolve this issue, a new extension table is created in Oracle Student System for storing person address level start and end dates.

11.1.8 Impact of Oracle Trading Community Architecture

Oracle Student System is closely integrated with Oracle Trading Community Architecture. To align Oracle Student System with the current version of Oracle Trading Community Architecture, the following areas in Oracle Student System have been modified:

- Person Languages level
Level of Understanding is a new column added to the Person Statistics window to record the level of language skills of a person. You can specify if the language skill record is active by selecting the Active check box.
- Person Employment History level
Employed by Whom is a new column added to the Employment Details window. Also a new field, Reason for Leaving, is added in the Employment Details window.
- Person Academic History

11.2 Person Overview

Institutions create person records in the Person subsystem that are used across other subsystems in Oracle Student System.

This overview consists of the following:

- [Oracle Student System and Oracle Trading Community Architecture](#)
- [Person Details](#)
- [Person International Details](#)
- [Person ID Groups](#)
- [Holds](#)
- [Tracking](#)

11.2.1 Oracle Student System and Oracle Trading Community Architecture

Oracle Trading Community Architecture represents an electronic integration of business information including organizations, people, places, and the network of relationships that bring them together. It is the common data model where information on all people and organizations associated with Oracle Applications are stored.

As Oracle Student System and Oracle Trading Community Architecture share common entities, such as people, organization, and institution, a decision was made to link Oracle Student System with Oracle Trading Community Architecture. This merger enabled Oracle Student System to obtain or store information on Oracle Trading Community Architecture on two shared entities: *Person* and *Organization*.

Person entities are created for *Student*, *Staff*, *Sponsor*, or any other person type. For example, students who wish to enroll in an educational institution, an existing student, a staff member who teaches a particular unit or program, or a sponsor are all recorded as *Person* in Oracle Trading Community Architecture.

While creating new person details, you can either query for the person in Oracle Trading Community Architecture or create a new person from Oracle Student System if the person does not already exist in Oracle Trading Community Architecture. New person details created in Oracle Student System are stored in Oracle Trading Community Architecture. Person details stored in Oracle Trading Community Architecture include:

- Person Number as a unique identifier

- Person First Name
- Last Name
- Address information
- Person Type (Student, Staff, Other)
- Family Details
- Relationships with other persons included in the system

In addition to Person, the Organization entity is also linked between Oracle Student System and Oracle Trading Community Architecture. The highest business unit in a University is the Institution. Within an institution, there can be multiple organizations or departments. For example, a Math department, a South Campus or Oriental Sciences division may be all be organizations of Vision University.

While creating a new organization, Oracle Student System can derive the *Organization* level information from Oracle Trading Community Architecture if that organization already exists in Oracle Trading Community Architecture. If not, the organization details are created in Oracle Student System and stored in Oracle Trading Community Architecture. Organization details stored in Oracle Trading Community Architecture include:

- Organization Name
- Start Date
- End Date
- Accreditation Details
- Address Information

Oracle Trading Community Architecture outlines a standard method for capturing and storing person and organization related information. This model in Oracle Applications is implemented through HZ sub product under Accounts Receivable suite of products. All application, which use the Oracle Trading Community Architecture model, stores Person and Organization related data in HZ subsystems.

11.2.2 Person Details

The basic person information recorded in Oracle Student System includes the following:

- Academic history
- Academic honors

- Activities
- Address
- Aliases
- Athletics
- Biographic details
- Credentials
- Disciplinary
- Employment
- Funding sources
- Faculty degrees
- Health and Insurance
- Holds
- Housing status
- Residency/Citizenship
- Military details
- Notes
- Office hours

Other details include:

- Person ID group
- Person identifier
- Person image
- Person type
- Phone/E-mail
- Privacy
- Relationships
- Special needs
- Statistics
- Qualification

On creating a person record, a person type of *Other* is assigned to the newly created person by default. The person type can change based on a change in a person's status. For example, when a student applies, the system assigns them the Person Type of **Applicant**. However, on actual enrollment, this status changes to **Student**.

You can manually assign seeded person types to a person. These person types include:

- Admission evaluator
- Advisor
- Applicant
- Faculty
- Graduate
- Prospect
- Self-service enrollment staff
- Staff

When recording person details, you must enter the mandatory data associated with a person type. Mandatory data varies by person type. For example, an e-mail address can be mandatory for the **Applicant** person type.

Apart from recording basic person details, such as name and address, you can record preferred alternate identifiers. Examples include social security and driver license numbers. Funding sources, ethnicity details, and any person alias names are other alternate identifiers.

You can also record the person residency class and status. This information is used for granting financial aid and calculating student fees.

Housing status applies to enrolled students and indicates where the person has been residing during a teaching period.

Academic honor details can be recorded in the Person subsystem and are used at the time of admission inquiry, or during application processing.

Person health and insurance details are recorded.

You can capture the special needs requirements of persons with disabilities in order to arrange for required assistance.

In addition to special needs, you can record relationships with other persons within the organization and to the organization.

You can maintain criminal history as well.

If the person is an international student, the passport and visa details, the port of entry, funding sources, citizenship, and dependent details are recorded.

Information regarding extracurricular activities and employment details is used for calculating credit points and for grading purposes. For example, persons with prior work experience and an athletic record are awarded credit points.

Under certain circumstances, dynamic prompts appear in several Person subsystem windows.

Table 11–1 *Dynamic Prompts*

Dynamic Prompt	Description
Deceased	If the person is deceased, a conditional field appears to allow user to enter the deceased date
Holds Exist	Indicates if a student has an academic hold restricting enrollment in the context program. Hold details are maintained in Person Hold Details window
Administrative Hold	Indicates if an applicant has an administrative hold restricting access to services provided by an institution. Hold details are maintained in the Person Hold Details window.
[Privacy Level]	Indicates level of privacy indicated for this level of data, for example, Level 5 - High. Privacy level is entered for data group and then the data group is assigned to a person.
[Active or Inactive Oracle Username]	Appears in Person Query window to indicate whether person is an active or inactive user. All windows that display person records also displays the Inactive Person lamp.
[Load Calendar Name and Dates]	Appears in Student Program Attempt window if student is enrolled in program. Load calendar is used to derive current attendance mode and type. For example, Load-Cal-1 01-JAN-1999 30-JUN-1999 A student's derived attendance mode and type can differ from the attendance mode and type of the program offered to the student which appears in the Person Query window.
[Lamp]	Appears when a merged or obsoleted person record is retrieved.

In the Person subsystem, confidential information is recorded and categorized into groups. Each data group is a collection of information such as a person's billing

address, telephone numbers, and degrees received. Access to confidential information is governed by the privacy level defined for a person.

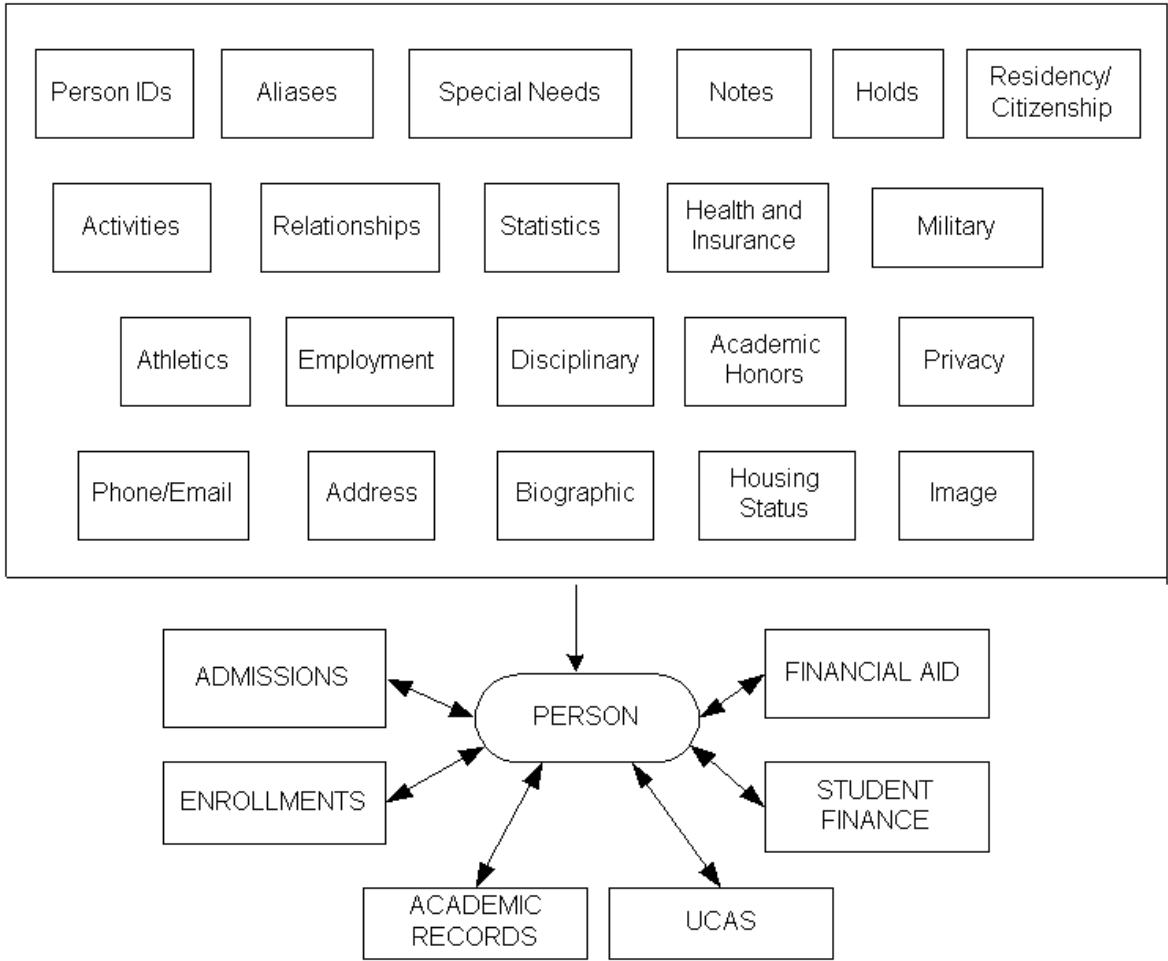
Person details are collected through various input points. These include:

- Recruitment Agencies
- Self-service
- Flat files provided by the government
- Other Oracle applications, such as Oracle Customer Relationship Management (CRM) and UCAS

You can import all person details collected through third-party (recruitment agencies) sources or other Oracle applications by running the Admission Import concurrent process.

The following figure displays the person details process.

Figure 11–1 Person Details Process



11.2.3 Person International Details

If you are based in the United States, you must record visa details related to international students with a visa status of F, non-academic students with a visa status of M, and exchange visitors with a status of J. The Student and Exchange Visitors Information System (SEVIS) collects and maintains information about foreign students and exchange visitors and facilitates the timely reporting and

monitoring of international students and exchange visitors. SEVIS enables schools and program sponsors to transmit electronic event notifications to the Immigration and Naturalization Service (INS) and the Department of State (DoS) throughout a person's exchange visitor program in the United States.

11.2.4 Person ID Groups

You can create person ID groups to group persons with common attributes. These groups facilitate management of people and person information generated by reports and processes. You can define person ID groups based on your institution's needs and policies. Examples of ID groups include **Sight** for sight-impaired students who require assistance in lectures and **Research** for students who volunteer for research projects.

11.2.5 Holds

You can apply holds to prevent administrative or academic activities. Hold effects are system-defined and are determined by the associated hold type. Hold types may belong to an academic or administrative category.

Academic holds can be used to do the following:

- Prevent admission or enrollment in a program or program group
- Prevent enrollment in a unit set or a unit
- Restrict enrollment to an attendance type or nominated credit points
- Enforce enrollment in a specific unit
- Prevent the awarding or disbursing of funds

Administrative holds prevent such actions as the releasing of results, mailing of program material, and the issuing of identity cards and transcripts. An administrative hold can prevent graduation.

Oracle Student System checks for holds during enrollment before confirming a unit attempt, changing an invalid unit attempt to enrolled, and before lifting a discontinuation. The enrollment process cannot release an external hold.

Student Finance applies holds when a student fails to pay a fee. You create a hold plan that specifies the fee types to which the holds would apply and the threshold balance. If the calculated hold balance for a student exceeds the threshold amount specified in the hold plan, a hold is applied. Student finance cannot release an external hold.

Academic Records applies academic holds when a student unit attempt fails progression rules. You may also apply holds without the context of a progression rule. Holds applied on financial aid can be used to exclude all or specific funds from being awarded, or to exclude all or specific funds from disbursement.

When holds exist on all funds, the manual awarding process can override these holds. However, you cannot override holds existing on specific funds.

When disbursing funds, you can override disbursement holds on specific or all funds.

You can also apply holds on students through an external system. However, the external system can only apply hold types already defined in Oracle Student System. To apply holds on a person, the external system notifies Oracle Student System of holds through business events so that Oracle Student System restricts the student accordingly. You cannot apply or release an external hold from Oracle Student System. External holds can only be released from the external system that applied the hold.

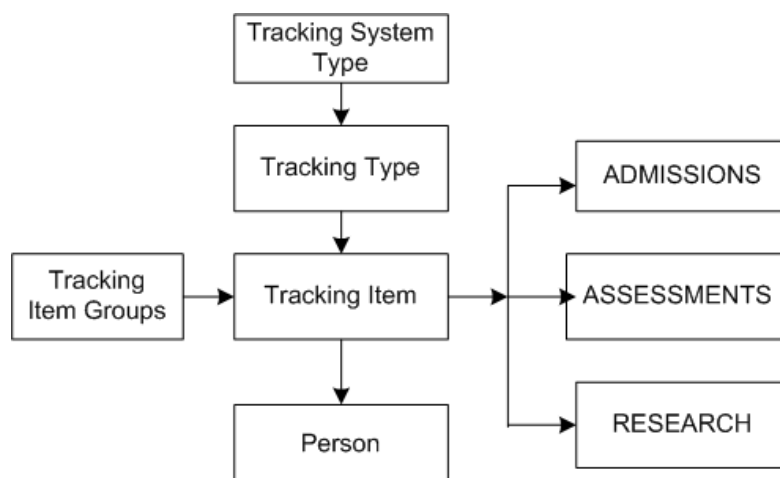
11.2.6 Tracking

Using the tracking functionality, you can monitor the movement of documents or the progress of defined processes, such as the admission or academic progression of a student. As documents or processes proceed through sequential steps, these steps are recorded in Oracle Student System. Progress is determined by the steps that are completed.

Tracking is defined in terms of:

- **Tracking item** - Document or process monitored by the Tracking windows.
- **Tracking type** (defined during setup) - Institution-defined type that identifies and classifies items being tracked, which maps to system-defined tracking types.
- **System tracking step type** - Tracking steps used to classify tracking steps based on the system-defined type.
- **Tracking step catalog** (defined during setup) - Master catalog of steps. Institutions have the option of creating a tracking step catalog.
- **Step group** - Group of steps linked together. If two or more steps share the same step group number, other steps can be substituted for steps sharing the same step group number.

The following figure describes the tracking process.

Figure 11–2 Tracking Process

11.3 Person Details

Educational institutions maintain person details such as address, alias name, family, housing, and residential status for processing student applications, enrolling students, assessing student fees, and maintaining student academic records. Person details are used by the following subsystems in Oracle Student System:

- Admission
- Enrollment
- Financial Aid
- Student Finance
- Academic Records

Apart from administrative and academic requirements, person details are crucial for recording and maintaining SEVIS information in the United States. This system maintains information on international students and exchange visitors.

11.3.1 Creating Person Details

To create person details, you can enter the following person-related information:

- Academic History Details
- Academic Honors Details
- Athletic Details
- Credentials
- Employment Details
- Faculty Degree Details
- Find Person
- Military Details
- Person Activities
- Person Details
- Person Disciplinary Details
- Person Health and Insurance Details
- Person ID Groups
- Person Image
- Person Notes
- Person Privacy Details
- Person Query
- Person Relationships
- Person Special Needs
- Person Statistics
- Qualification Details (original window name was Previous Education)

You can record details of an individual's prior military service, participation in sports, special needs due to physical disabilities, and voter registration. You can also record a person's relationship with another person in the organization or the relationship between the person and the organization, for example, the relationship between a student and an advisor.

In addition, you can record family details and assign one of the family member as a primary member. The address of the primary family member is inherited by the student who is legally minor. You can also record and maintain a person's criminal history, if any. You can apply holds if the person has a criminal history.

Apart from family details, you can record details about the person's residency and citizenship status, qualification details, credentials, and academic history.

You can set criteria to check for duplicate persons while importing person information from outside or while creating new persons. The information is used in defining matching criteria from various source types, such as a list of prospects, applications, transcripts, admission test results, self-service admission applications, and self-service inquiry prospects.

11.3.1.1 Creating Person Details

When you create a person record in Oracle Student System, a default *person type* is assigned. A person type signifies the person's role at an institution such as a prospect, applicant, student, alumni, former student, staff, or faculty. New person records are assigned the person type *Others* by default. This person type may be changed to *faculty*, *applicant*, *self-service student*, or *admission evaluator*. For example, a new student is assigned the person type *Other* by default. This is later changed to person type *Student* when the student is associated with an application and enrolls in a program(s) of study.

Person Types are described as follows:

- **Prospect:** Someone who inquires about admission and for whom an inquiry record is created. Each application instance will result in a Prospect person type. A person may have multiple active Prospect person types when applying to different programs.
- **Student:** Someone who enrolls in unit section attempts. A person may have multiple active Student person types when enrolled in more than one program attempt. When a student transfers from one enrolled program to another enrolled program, the former program's Student person type is ended and the new program's Student person type is started.
- **Former Student:** Someone whose program attempt status is **Inactive** or has lapsed. When a student's program attempt becomes inactive or lapses, both the Student person type and the Former Student person type are updated. The Former Student person type start date is one day after the last date of the last teaching period in which the student was enrolled. If a student discontinues enrollment prior to the end of a teaching period, the last date of attendance is used as the end date of the Student person type.
- **Graduate:** Someone who has been given an award such as a degree or a certificate, for completing the requirements of a program attempt. Each degree conferred upon a student will result in a Graduate person type.

- **Faculty:** Someone who is assigned as the instructor of a unit section. If a valid Faculty person type already exists, and the person is assigned to teach additional unit sections, the Faculty person type is not changed and no additional Faculty person type is created.
- **Advisor:** Someone who is related to another person through the relationship type of **Advisor of**.
- **Staff:** Someone who is indicated as a coordinator or contact person for a location or venue belonging to the local institution.
- **External Contact:** Someone who has a relationship type of **Contact** of with a non-local institution or organizational unit.
- **Non immigrant Student:** A nonimmigrant or nonresident for immigration purposes, who is not a citizen or permanent resident of the US and has been admitted to the US for a temporary stay. A student with an F-1 visa is an example of a nonimmigrant.
- **Exchange Visitor:** A foreign national who is granted a J-1 visa by the INS. It includes persons who visit the United States for exchanging skill and knowledge in the fields of education, arts, and sciences.
- **Interviewer:** Someone who can interview or screen an application.
- **Evaluator:** Someone who can rate or evaluate an application.
- **Other:** Someone one who does not meet the requirements of any of the other system-defined person types.

Using the Person Details window, you can query an existing person and update associated person details or you can create a new person.

If you are unable to save a new person record in the Person Details window and an error message is displayed, set the profile option **HZ: Turn On File Debug to No** at the responsibility and site level.

You can map the person records in Oracle Human Resources Management System, associated with the person type Employee, to those in Oracle Student System to enable synchronization of data between the two applications. You cannot update the data from Oracle Human Resources in Oracle Student System.

Prerequisites

Person types are defined.

Person ID types are defined.

Person alias types are defined.

Ethnic origin are defined.

Religion codes are defined.

Navigation

Person Reference > Person Details

Steps

To update existing person details:

1. Query for an existing person in the Person Details window. The relevant records are displayed in the Person Details window.

For a detailed query, click the Find Person icon and query in the Find Person window. If there is more than one address, this window displays only the primary address for a person number.

2. Make changes and save your work.

To create a new person record:

1. Enter the person name in the Person Details window.
2. Save your work.

If a duplicate record is entered, the Duplicate Person Details window opens up and displays the duplicates.

3. Click **Create/Update Person** in the Duplicate Person Details window to modify the new record.
4. Optionally, click **Select Record** to make changes to the duplicate record or click **Cancel** to enter a fresh person record.
5. Save your work.
6. Click the Address tab to enter person address details and its usage.

The person number is automatically created if the profile HZ generate party number is set to **Yes**. If not, set to **Yes** manually.

You can enter the address details based on the configuration of the location flexfield structure in Accounts Receivables. The list of tabs and buttons that appear in the Person Details window is based on the configuration in the Configuration Form window.

7. Click the Phone/E-mail tab to enter person phone and e-mail address.
8. Click the Types tab to enter person type.

When persons details are first entered, the person type defaults to **Others**. The person type changes relative to the person status. For example, when an individual makes an inquiry, the status is changed to **Prospect**.

You cannot assign person types of *Other*, *Prospect*, *Applicant*, *Student*, *Former Student*, and *Graduate* manually or using the import process.

For information on admission import process, see [Importing Admission Information](#), Admissions.

The employee category is valid only for person types of **Staff** and **Faculty** and is displayed only when Oracle Human Resources is not installed.

9. For a person type of **Faculty**, **Staff**, or **Advisor**, click the Office Hours tab to enter office hours.

Office hour details include contact type, preference code, start date, start and end time, day of the week, and specification of the person who requested the office hour details. Faculty, Advisor, or Staff may have different office hours on different week days. These details are used to record their availability for managing appointments.

10. Click the Identifier tab to enter person ID type and alternate person ID.

Examples of person ID type include driver license and social security number.

11. Click the Groups tab to assign a person ID group to the person.

12. Click the Biographic tab to enter biographic details.

You can enter multiple races for a person in this tab. Choose from American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White. You can add more if required.

13. Click the Housing Status tab to enter details of a person's housing status.

Housing status details apply only to enrolled students.

14. Click the Aliases tab to enter an alias name, such as an alternative, assumed, former, maiden, or stage name.

15. Save your work.

11.3.1.2 Creating Person ID Groups

Person ID group definition involves creating and managing groups of people with common characteristics. The different ways of creating person ID groups include:

- Manual creation in the Person ID Group Definitions window
- Importing Person ID groups through a flat file
- Dynamic creation using Discoverer
- Manual creation using self-service

You can import persons from one ID group to another, import files of person IDs into groups, copy persons from an existing group to form a new group, and delete persons from a group.

You can also create person ID groups using self-service.

You create person ID groups to manage tasks for similar persons, for example, you can group together all freshmen in the person ID group Freshmen. You can run concurrent processes for this group of freshmen students using the freshmen person ID group.

Person ID groups can be either *static* or *dynamic*. In a static person ID group, the members added during setup remain constant. Whereas the members of dynamic person ID groups are allocated to a group only if they meet the group criteria.

For example, a workflow can create a dynamic person ID group to send hold alerts on a specific day. The members of this person ID group can change when the workflow sends notification two days later as some members may have made payment and had their holds released.

Prerequisites

Person types are defined.

Person ID types are defined.

Person alias types are defined.

Ethnic origin is defined

Religion codes are defined.

Navigation

Person Reference > Details > Person ID Groups

Steps

1. To define a group, enter the group code and description in the Person ID Group Definitions window.
2. Select the person responsible for the group.
3. Save your work.
4. In the Members tab, enter the ID numbers of the persons to be included in the group.
Member details are displayed in the Details tab.
5. Click **Copy Current Group** to quickly create a new group.
The group code is automatically generated. You can update it, if desired. The description displays the group code from which it is copied.
6. Click **Import Group** to import members from another group to the current group.
7. Click **End All Active Members** to select an end date for all the active members in the group.
8. Click **Purge All Members** to delete the members in the group.
9. Click **Import File** to import person numbers from an existing file to the current group. Enter the file path and click **OK**.
The format of the file is to have a single person ID value per line. There must be no comma separator or trailing blanks in any line.

11.3.1.3 Creating Qualification Details

Qualification details are specific to students from the United Kingdom or any other commonwealth country.

Using the Qualification Details window, you can enter a student's qualification details, such as the type of qualification, subject in which the student earned the qualification, and the name of the awarding body.

To apply for admission, students must submit transcripts of the degrees received. If the student is yet to receive a transcript from the awarding body, you can enter the claimed, actual, and projected result for that student. Results captured can be of three types:

- Predicted by the applicant
- Claimed as reported by the applicant

- Approved or final as displayed in the qualification certificate from the awarding body

Qualifications are used instead of credit points and GPA in the UK and other commonwealth countries. Individual student subject grades are used to derive a total single score or UCAS tariff for all the qualifications attained.

For more information, see [Maintaining Transcripts and Qualifications](#), Admissions.

Prerequisites

Qualifications are defined and mapped to Oracle Student System awards.

Grading schemes and grades for them are defined.

Institutions or awarding bodies are defined.

Navigation

Person Reference > Details > Qualification Details

Steps

To enter qualification details:

1. Query for the appropriate person number in the Qualification Details window.
2. In the Qualification Details tab, select the qualification of the applicant. Enter the subject of the qualification and the year in which it was obtained.
3. Select the awarding body, the time or sitting of the qualifying examination.
4. Select also the predicted, claimed, and final or approved grades for the qualification subject.
5. Save your work.

11.3.1.4 Adding Academic Honor Details

During a course of study, a student may receive academic awards and honors. You can record such information using the Academic Honors window and enter additional information on special certificates or academic recognition.

Prerequisites

Academic honors are defined for the PE_ACAD_HONORS lookup type.

Navigation

Person Reference > Details > Academic Honors

Additional Notes

Query the appropriate person record in the Academic Honors window and enter the name of the Academic Honors and the date when the honor was received. You can also specify additional comments, if any.

11.3.1.5 Adding Academic History Details

You can use the Academic History Details window to capture student academic information, such as details of degrees and awards. You can also enter information on the educational institutions where the applicant attempted the program, the duration of attendance, program details, grade aggregates for the units attempted, and the awards or degrees conferred.

Prerequisites

Qualification levels are defined.

Grading scales and default values for the Institution Grading Scale profile option are defined.

Navigation

Person Reference > Details > Academic History Details

Steps

To enter student academic history details:

1. Query the appropriate student number in the Academic History Details window. Enter the highest qualification level in the Academic History region and select the appropriate radio button to display all records or only active records.
2. Select the appropriate institution code for the educational institution where the student is currently pursuing or has completed an academic degree. Optionally, you can specify the effective dates between which the student attended the institution.
3. When you select an institution code, you can specify if the institution is active and if a student transcript is required as well as whether the transcript has been received or not. The Active check box is used to specify if the student is still

enrolled with the institution and the Required check box is used to indicate if the student requires to produce a transcript from that institution.

A transcript is considered received and the Received check box selected only if the transcript received matches the following profile options:

- IGS: Admission Transcript Status
- IGS: Admission Transcript Type

For more information on the new profile options for transcript type and status, see the *Oracle Student System Implementation and Administration Guide*.

4. In the History Details tab, enter the following details:
 - Degree attempted
 - Degree earned
 - Program
 - Planned completion date associated with the degree
 - Additional comments, if any
 - Planned completion date of the program
5. Use the Current Institution check box to specify if the student is already enrolled in the institution to which an admission application for a new course is being submitted.
6. In the Recalculated Details tab, enter the following details:
 - Total credit points attempted by the student
 - Total credit points earned
 - Total unit grade points
 - Institution grade point average
 - Grading scale used by your institution and set as default for the IGS: Institution Grading Scale profile option.
7. Save your work.
8. In the Self Reported Details tab, enter the following details:
 - Grading scale type
 - Institution grade point average
 - Class size

- Rank in class
- Total unit credit points attempted
- Total unit credit points earned
- Total grade point average unit attempts

You can use the Weighted check box to indicate if the institution grade point average and the rank in class is weighted.

- 9. Click **Transcript Summary** to view transcript details associated with a student. For more information, see [Entering Transcripts](#), Admissions.
- 10. Click **Advanced Standing Details** to view student advanced standing details.

11.3.1.6 Adding Athletic Details

You can capture student athletic details using the Person Athletic Details window.

The following table details the information you can view, add, and modify in this window.

Table 11–2 Person Athletic Details Window description

Field	Description
Grade Point Average	Student grade calculated based on the average grades received by students by taking into account the total study load
Predicted Eligibility	Estimated student eligibility based on current academic standing
Eligibility Status	Student’s current eligibility status. Examples of eligibility status are qualifier or partial qualifier.
Test Scores button	Opens the Admission Test Summary window
Date of Review	Date when the student application is reviewed
Comments	Used for adding any additional information
Athletic Program	Name of the athletic program(s) attended by the student
Rating	Rating for the athletic program(s) attended by the student
Start Date	Athletic program start date
End Date	Athletic program end date
Recruited	Select this check box to indicate the student is recruited
Participating	Select this check box to indicate that the student is a participant

Table 11–2 (Cont.) Person Athletic Details Window description

Field	Description
Last Updated	Last date when the details were updated

Prerequisites

Athletic programs are defined.

Lookups for Eligibility Status, Predicted Eligibility, and Tentative Admission Type Eligibility are defined.

Navigation

Person Reference > Details > Person Athletic Details

Steps

To enter person athletic details:

1. Query the appropriate student number in the Person Athletic Details window and enter the grade point average. These are user-defined values created during setup.
2. Select the predicted eligibility and eligibility statuses from the list of values.
3. Click **Test Scores** to view the student's admission test summary. For more information, see Admissions.
4. Select the tentative admission type for the student and specify the review date.
5. Select the athletic program and specify the start and end date of the program.
6. Select the Recruited check box to indicate if the student is already recruited with the institution.
7. Select the Participating Check box to indicate if the student is participating in the athletic program specified.

11.3.1.7 Creating Military Details

You can enter student military details, such as the duration of military service, type of assistance received, and type of discharge.

Prerequisites

The military assistance type and status, military service, and military separation types are defined.

Navigation

Person Reference > Details > Person Military Details

Steps

To add person military details:

1. Query the appropriate student number in the Person Military Details window.
This window is available only if the IGS:Country Code profile is set to US in the profile options.
2. Select the type of military service applicable to the student from the list of values available. These are user-defined values created during setup.
3. Specify the duration of the military service by entering the start and end dates.
4. Select a separation type applicable to the student. The Separation Type field lists modes of separation from the military, such as honorable and dishonorable. These are user-defined values created during setup.
5. Select the type of assistance received by the student and the status of the assistance from the list of values.
6. Select the Military Service Registration check box to specify if the student is already registered with any of the military services.

11.3.1.8 Creating Employment Details

You can enter the employment details of a student using the Employment Details window. Details captured in this window include the name of the employer, type of employment, hours of work among other details.

Prerequisites

Types of Employment, Tenures of Employment, and Occupation Codes are defined.

Navigation

Person Reference > Details > Employment Details

Steps

To enter the student employee details:

1. Query the appropriate student number in the Employment Details window.

2. In the Employee Details region, select the Employment History tab and enter the following details:
 - Name of the employer
 - Name of the division where the person works
 - Effective start and end dates of the employment
 - Type of employment
 - Fraction of time spent at employment Valid values are from .01 to 100.00
 - Occupation code
 - Weekly work hours
 - Reason for leaving
 - Other contact name, if any
 - Additional comments, if any

Note: Employer and Employed By Whom fields are mutually exclusive fields. If you cannot find the Employer Name from the list of values in Employed By Whom region, you can enter the name of the employer in free form text Employer field.
3. In the Institution Employment tab, view the employment category, if applicable.

11.3.1.9 Creating Person Image

You can use the Person Image window to upload a student's photograph to the Person database.

Prerequisites

Correct path or file name is specified in the Person Image window.

Navigation

Person Reference > Details > Person Image

Steps

To add a student image:

1. Query the appropriate student number in the Person Image window.

2. Enter today's date.
3. Enter the correct path or the file name where the image can be located and click **Load Image**.

11.3.1.10 Creating Person Relationships

You can capture the relationship details of a student with other persons or with the organization. For example, you can capture the relationship between a staff member and a student where the staff member is a graduate assistant in a course the student is taking or the staff member is the parent of the student. You can also define the relationship between a student and the organization. For example, the student can be an employee in the university food service.

Prerequisites

Relation types are defined.

Related person or organization exists within Oracle Student System.

Navigation

Person Reference > Details > Person Relationships

Steps

To enter or view person relationships:

1. Query the appropriate student number in the Person Relationships window.
2. To establish a relationship between two persons, in the Person tab, enter the following:
 - Type of relationship from the list of values.
 - Name of the related person from the list of values.
 - Select the Primary or the Secondary check boxes to specify the nature of the relationship.

The Joint Salutation field and the Primary and Secondary check boxes are enabled only for the relationship types of Child, Domestic Partner, Guardian, Parent, Relative, Sibling, and Spouse.
 - Select the Next of Kin check box to indicate that the related person is a close family member or spouse.

- Select the appropriate check box in the Reported region to indicate the type of relationship reported by the student.
- Additional comments, if any.

You can also navigate to the Person Details window to enter details of the person related to a student, if that information is not already recorded.

3. Save your work.
4. To establish a relationship between a student and an organization(s), enter the following details in the Organization tab:
 - Select the type of relationship from the list of values.
 - Select the organization name from the list of values.
 - Select the organization name from the list of values. The organization code is automatically entered.
 - The start date defaults to the system date and you can specify your own end date.
 - Enter additional comments, if any.
5. Save your work.

11.3.1.11 Entering Person Credential Details

You can enter the credential details, such as recommendations, personal essays, and portfolios in the Credentials window.

Prerequisites

Credentials must be defined and mapped to system-defined credential types and tracking steps.

Navigation

Person Reference > Details > Credentials

Steps

1. In the Credentials tab, enter the user-defined credential type and the date of receipt. The default is the current system date.

You can access the Credentials window from Admissions or from the Record Inquiries window in Student Recruiting. The window opens with the person information in context displayed in the header region.

For information on rating a credential, see [Reviewing and Rating Credentials](#), Admissions.

2. In the Review Details tab, use the Find Person icon to enter the person number of the reviewer assigned to review and rate the credential.
3. For a credential type mapped to the system type of *Recommendation Letter*, enter the name and title of the person recommending the applicant. If the recommendation comes from an organization and not an individual enter the name of the organization.
4. Click **Update Tracking** to request that the credential tracking step status in the Tracking subsystem be updated to **Complete**.
5. Save your work.

11.3.1.12 Entering Person Disciplinary Details

You can capture the details of a person's criminal history, if any, in the Person Disciplinary Details window. You can record the nature of the crime and the action taken.

You can also navigate to the Holds window from this window.

Navigation

Person Reference > Details > Person Disciplinary Details

Steps

To enter criminal history details:

1. In the Arrest and Felony tab, enter the following:
 - The description of the crime and the date the crime was committed.
 - Select the Criminal Convict check box if the person is a criminal convict.
 - Enter appropriate text to explain the disciplinary action taken.
2. Save your work.
3. In the Hearings tab, enter the following information:
 - The outcome of the hearing.
 - Select the start and end date.

- Select the appropriate check box to indicate if a disciplinary file exists, if the crime resulted in an academic dismissal, or if the crime resulted in a non-academic dismissal.
- 4. Save your work.
- 5. Click **Holds** to view, apply, or release holds for that person. For more information on Holds, see [Person Holds](#).

11.3.1.13 Entering Person Privacy Details

You can view the privacy details of a person in the Person Privacy Details window. You can specify the data group to which the person belongs and release the person from that data group, if required.

Prerequisites

Data groups, Actions, and To whom lookups are defined.

Navigation

Person Reference > Details > Person Privacy Details

Steps

To enter the privacy details of a person:

1. Query the appropriate person number in the Person Privacy Details window.
2. Select the data group from the list of values. The level is specified by default when you select a data group. Data Groups are groups of information that are considered private or confidential. Whereas, levels are institution-defined levels of privacy.
3. Specify the action to be taken and to whom the information can be released.
4. Specify the effective start and end dates.

11.3.1.14 Entering Person Health and Insurance Details

You can enter person health and insurance details in the Person Health and Insurance Details window. Insurance details include information, such as the type of insurance, the policy number, and the name of the insurance company. Health details include information, such as immunization and vaccinations history.

Prerequisites

Insurance types are defined.

Health Requirement (immunization types) and statuses are defined.

Navigation

Person Reference > Details > Person Health and Insurance Details

Steps

To enter a person's insurance and health details:

1. Query the appropriate person number in the Person Health and Insurance Details window.
2. Select the Proof of Insurance Provided and the Proof of Immunization Provided check boxes if applicable.
3. In the Insurance tab, enter the following details:
 - Select the insurance type from the list of values. Enter the name of the insurance provider and specify the policy number.
 - Specify the date in the From field to indicate the effective date from which the insurance is valid. By default, the From field displays the system date.
 - Specify the last date until which the insurance is valid in the To field.
4. Save your work.
5. In the Health Requirement tab, enter the following details:
 - Select the type of immunization or vaccination.
 - Select the status of the health requirement.
 - Specify the effective start and end dates.
6. Save your work.

11.3.1.15 Entering Person Statistics

You can enter person details on income tax, voter registration types and their associated codes, languages, and other general information in the Person Statistics window.

The matriculation term in the General tab is automatically populated if the profile IGS:Person matriculation term is set to generic or non-generic programs. The initial

admittance term is automatically populated, when the person first accepts the offer. You can update it manually later on.

The most recent admittance term is automatically populated for Offer Accepted or Enrolled unit attempts when the profile IGS:Person most recent admittance term is set. The catalog is automatically populated for initial admittance term, matriculation term, or most recent admittance term, when the profile IGS:Person catalog is set.

Prerequisites

Load calendars and academic years are defined.

Language and skill levels are defined.

Voter types and codes are defined.

Further Education types are defined.

Income Tax types and codes are defined.

Navigation

Person Reference > Details > Person Statistics

Steps

1. In the General tab, enter the following:
 - Academic year in which the person completed matriculation
 - Initial admittance term
 - Most recent admittance term
 - Appropriate catalog
2. In the Others tab, enter the following:
 - Effective tuition dates
 - Further education, the student might pursue

Optionally, select the In-State Tuition at Another State check box to indicate if the student is from within the state or from another state.

The Religion field is displayed only if the profile option IGS:Decides whether the Religion tab has to be displayed, is set to Yes.

3. In the Language tab, select the following:

- Language and skill levels
 - The Native check box to indicate if the selected language is the native language
 - The Primary check box to indicate the primary language
 - Select the Active check box to indicate if the language skill record is active. If you select the Native or the Primary check box, the Active check box will be automatically selected.
4. In the Voter Registration tab, enter the following details:
 - Voter type from the given set of codes
 - Effective start and end dates
 5. In the Income tax tab, enter the following details:
 - Income tax type and code
 - Effective start and end dates
 6. Save your work.

11.3.1.16 Entering Person Special Needs

You can create a record of student special needs in the Persons Special Needs window.

Special needs are maintained in Oracle Student System based on the special need type, required need allowance, additionally required support levels, and eligibility for early registration of special needs. The Persons Special Needs window also maintains additional information, special needs contacts, and services.

Prerequisites

Special Needs are defined.

Special Needs Allowances are defined.

Additional Support Levels are defined.

Special Service Codes are defined.

Navigation

Person Reference > Details > Person Special Needs

Steps

To enter special needs:

1. Query for the appropriate person number in the Person Special Needs window.
2. Select the special need type from the list of values and specify the special need allowance, such as extra time for writing examinations.

To change the special need type of a person, assign the desired need type and enter the end date for the previous need type to indicate end of requirement.

3. Select the additional support levels from the list of values. Additional support levels include support required by students to attend classes or examinations, such as class note taker.
4. Select the Eligible for Early Registration check box to indicate if the student is eligible for early registration due to disability.
5. Select the effective start and end dates. To prevent further use of a special need record, you must enter an end date for the special need. You cannot delete a special need record.
6. In the Additional Information tab, enter the following:
 - The information source, for example, medical certificate or medical records.
 - Name of the interviewer. You can use the Find Person window to view the list of interviewers in Oracle Student System
 - Enter the date of the interview
7. In the Special Needs Contacts tab, enter the following details:
 - Interview date
 - Contact name for students requiring special needs
 - Special needs comments
8. In the Special Needs Services, select the following details:
 - Special service code from the list of values defined during setup.
 - The Documented check box to indicate that the special service code has been documented
 - Effective start and end dates
9. Save your work.

11.3.1.17 Entering Faculty Degree Details

You can enter faculty degree information in the Faculty Degree Details window as follows:

- Degree details, which include degree, program/major, institution, and date of degree completion
- Discipline code corresponding to the units taught by the instructor.
- Units taught by the instructor

Prerequisites

The person is a faculty member.

Discipline codes are defined.

Unit codes are defined.

Navigation

Person Reference > Person Details > Others...

Steps

To enter details for a member of the faculty:

1. Query the appropriate party number in the Person Details window and click **Others...**

The Form window appears with the list of windows displayed. This window will appear only if the person type is faculty.

2. Select Faculty from the list of windows and click **OK**.

The Faculty Degree Details window appears with the person details displayed.

3. In the Degree tab, select the following details:

- Degree awarded to the faculty
- The Program in which the degree was awarded
- The institution where the degree was received
- The date when the faculty member received the degree

4. In the Disciplines tab, select the discipline code that faculty member is authorized to teach

5. In the Units tab, select the unit code that the faculty member is authorized to teach.
6. Save your work and click **Done** to close the window.

11.3.1.18 Entering Faculty Degree Information and Assigning Workload

You can enter a faculty member's degree information, including degree, program or major, institution attended, and date of graduation. You can also enter the discipline and unit information for which the faculty member is approved to teach.

In addition, you can assign new tasks to a faculty member or override the previously assigned workload.

Prerequisites

The faculty member is set up and the person type is **Faculty**.

Navigation

Person Reference > Person Details > Faculty Degrees

Program Structure and Planning > Faculty > Assign / Override Faculty's Workload

Steps

1. Enter the degree, program or major, institution, and date the faculty member received the degree.
2. Enter the code of discipline that the faculty member is authorized to teach.
3. Enter the unit code that the faculty member is authorized to teach.
4. Click **Done** to save your work.
5. Navigate to the Assign / Override Faculty Workload window and select the faculty member.
6. Enter the calendar category and calendar type that have been set up for the expected workload.
7. Enter the amount of workload for the faculty member in the **Assigned Teaching Workload** field.
8. Enter the faculty member's task code and the department budget code. Select the **Confirmed** check box to confirm the task. Enter the discipline code in the **Workload** field.

9. Enter the number of times the task should be rolled over. If you have two terms, Spring and Fall, and you want to roll over a task from Spring 2004 to Spring 2005, enter **2** for the rollover period number.
10. To override the expected workload, enter a start and end date, the new expected workload, and the override reason.
11. Save your work.

11.3.1.19 Entering Person Notes

You can add person specific notes in the Person Notes window while updating or creating person records.

Prerequisites

Person Note Types are defined.

Navigation

Person Reference > Details > Person Notes

Steps

To enter person notes:

1. Query the appropriate person number in the Person Notes window.
2. Select a person note type from the list of values. Person note types are institution-defined. Possible person note types include academic, disciplinary, and Other.
3. Specify the effective start and end dates for the notes.
4. Save your work.
5. Click **Edit Note** to enter person specific notes in the text format.
6. Save your work.

11.3.1.20 Entering Person Activities

You can enter extra-curricular and academic activity information in the Person Activities window. Academic activities may or may not be related to the individual's line of study. For example, the applicant may be a science graduate and participate in academic activities such as dramatics or elocution. You can add details, such as level of participation, team name for sports, time spent on a weekly and hourly basis and source of information.

Prerequisites

Activity types are defined.

Sources are defined.

Levels of Participation are defined.

Navigation

Person Reference > Person Details

Steps

To enter activity details:

1. Query the appropriate person number in the Person Details window and click **Others...** The Form options window appears with the list of Form displayed.
2. Select **Activities** from the list of windows and click **OK**. The Person Activities window appears with the person activity details displayed.
3. Enter the activity name and select an activity type. For example, sports, music, theatre from the list of values displayed.
4. Specify the activity start and end dates and hours per week spent on named activity.
5. Specify the weeks per years spent on the activity and then rank the activity according to the person's preference.
6. Specify the team name the person plays for or supports and enter the level of participation of the person from the list of values, for example, player, umpire, spectator, or coach.
7. Select the Sports Indicator check box to indicate if the selected person participates in sports.
8. Select the source of information for extra curricular activity details from the list of values, for example, personal statements, self-service inquiry, transcript, and questionnaire.
9. Enter the date and time when the activity record was created. This defaults to the system date and time.
10. Save your work.

11.3.1.21 Entering Person Query

You can use the Person Query window to query and view person data including:

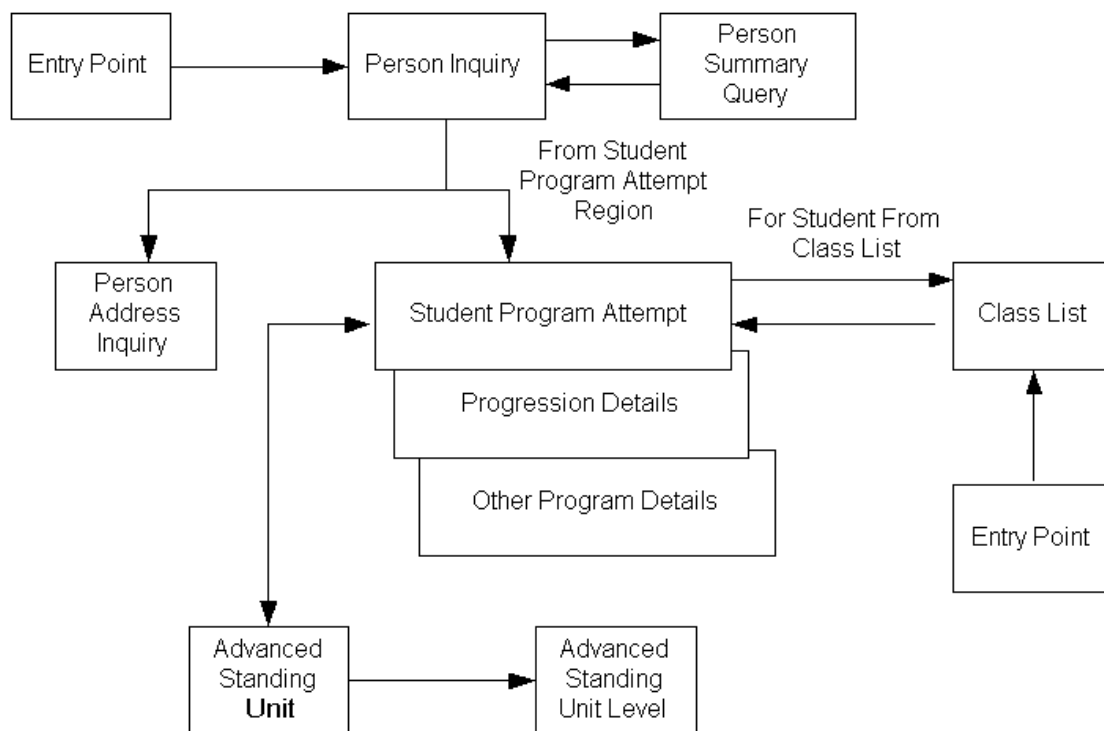
- Last and first name
- Date of birth
- Gender
- E-mail address
- Person number

You can also view student program attempt details including:

- Program name
- Short title of the program
- Calendar type
- Location code
- Attendance mode and type
- Program attempt status

In addition, you can view the student address history, program enrollment details, and program attempt details.

The figure below describes the various points where person details are entered into Oracle Student System and the windows where person details can be queried.

Figure 11–3 Person Query Points**Navigation****Person Reference > Person Query****Steps**

To query for an existing person:

1. Enter the query criteria in the Person Query window. The relevant records are displayed in the Person Query Summary window.

If the person is deceased, the Deceased check box is automatically selected.

For a detailed query, click the Find Person icon and query in the Find Person window. If there is more than one address, this window displays only the primary address for a person number.

2. Click **Accept** to return to the Person Query Window.
3. Click **Address History** to view the addresses. The Address History window appears with all the person addresses displayed.
4. Click **Program Enrolled** to see the list of programs in which the person has enrolled. This button is activated only if the person has confirmed program enrollment.

The Student Program Attempt window appears with the enrollment details displayed. You can also view the progression, administrative, and academic details in this window.

5. Click **Details...** to view the enrollment details in the Student program Attempt window.
6. Click **Progression** to view the credit point and completion period details. Click **Back** to close the Progression Details window.
7. Click the Class List Inquiry icon to view the person's class details including unit code, academic period, unit location, and teaching period.
8. Click **Administrative** to view the administrative details of a student unit attempt, such as location, unit class, status, and credit points.

11.3.1.22 Using the Find Person Feature

You can use the Find Person window to narrow your search and query based on person-specific criteria. These include:

- Alternate person ID
- Person ID type
- Full name
- Date of birth
- Gender

In addition, you can also query a person based on person address details. However, you can only view program attempt and application summary information and you cannot further query on this information.

Prerequisites

Person details exist.

Navigation

Person Reference > Person Details > Find icon

Steps

To search for a person using the Find window:

1. Click the Find icon in the Person Details window.
2. Enter the alternate person ID, person ID type, full name, date of birth, and gender. Optionally, you can enter any one of these criteria to query a person.
3. In the Person tab, enter the following:
 - Alternate person ID
 - Person number
 - Last name, first name, preferred given name, and prefix
 - Select the person status (**Active** or **Inactive**)
 - First and last enrollment details
4. In the Address tab, enter the following:
 - Address, city, and country details
 - Enter the E-mail address
 - Province and postal code details
5. Click **Find** after you have entered all the selected fields.
6. Optionally, click **OK** if the required person details are already displayed in the Find window.

11.4 Person International Details

In the United States, educational institutions can record, maintain, and track details of international students and exchange visitors. The student's program of study, program funding source, the country of birth, citizenship, or permanent legal residence are recorded.

Student and Exchange Visitors Information System (SEVIS) maintains information on international students and exchange visitors. Oracle Student System transfers new or modified information to SEVIS through interface tables. SEVIS processes the information, which you can download using a concurrent process.

A person can have only one active nonimmigrant or exchange visitor record.

11.4.1 Creating Person International Details

You can enter international details in the Residency/Citizenship Details window in the Person subsystem. Person international details include the following information:

- Residency class, status, state of residence, and country of physical residence
- Passport
- Visa
- Port of entry
- Citizenship
- Funding
- Dependents

Prerequisites

Person types are defined.

Visa types, country codes, and funding sources are defined.

Residency Classes and Residency Statuses are defined.

Visa Issuing Posts are defined.

Places of Entry are defined.

Citizenship/Residency Statuses are defined.

Relationships are defined.

Navigation

Person Reference > Details > Residency / Citizenship Details

Steps

To create person international details:

1. Query the appropriate person record in the Residency/Citizenship Details window.
2. In the Residency tab:

- Select the residency class of the person from the list of values. The fee assessment for a person can vary depending on the residency class selected. You cannot update the Residency Class. Residency Class records cannot be deleted once created since these records are used by other subsystems, such as Student Finance and Financial Aid.
 - For more information, see the *Oracle Student System Implementation and Administration Guide*.
 - Select the residency status of the person from the list of values. The residency status indicates if the person is a resident of the state where the institution is located or is from another state or country. If the person has applied for state residency, the status of such an application can be selected.
 - Select the date when the residency application was evaluated by the institution.
 - Enter the name of the evaluator and the effective start and end date of the residency status.
 - Click the Residency Details: Comments icon to enter additional comments, if any.
 - Click the Residency Details: History icon window to view person residency details history.
 - Enter the names of the state and country of residence. The state of residence is used to capture the actual state in which the student resides (or claims to reside). The Country of Physical Residence is the actual country in which the student resides (or claims to reside).
3. Save your work.
 4. In the Passport tab, enter the following:
 - Passport number
 - Country code
 - Expiry date
 5. Save your work.
 6. In the Visa tab, select the following:
 - City and country where the visa was issued
 - Visa type and number
 - Visa issue and expiration date

- Details of the organizational unit to which the person belongs, the person number, and the start date. This person number represents the agent acting on behalf of an international student.
7. Save your work.
 8. In the Port Entry tab, select or enter the following:
 - Visa type
 - Country entry number, place of entry, and entry date. You select the Visa Number saved in the Visa tab. The Visa type in this tab is automatically picked up from the Visa tab.

The port of entry and expiration dates are within the range of the visa issue and expiration dates.

9. Save your work.

Validations

The following business rules apply to residency class:

- Residency Class can be inserted only once and becomes display only when the record is committed.
- Once a value from the Residency Class list of values is selected, the same value cannot be used in another record. Each residency class is unique.
- Residency Status, Evaluation Date, Evaluator, Effective From Date, and Effective To Date can be updated.
- Each time the Residency Status, Evaluation Date, Evaluator, Effective From Date, Effective To Date, Comment and Descriptive Flexfields are updated, a record is created in the Residency History table. For example, if the residency class of a student is **In State** and the residency status changes from **Under Review** to **Student Appeal** to **Final Review**, the most recent record is displayed on the Residency/Citizenship Details window, and the previous two status records are displayed in the Residency:Details History window. You can access this window by clicking the Residency:Details History icon in the Residency tab.

These business rules also apply to the Admission Import Process for the Source Category of Residency Details.

11.4.2 Terminating and Activating Dependents

You can enter details of an international student's dependents in the Residency/Citizenship details window.

Data is displayed in the Dependents tab if the student has spouse or parent relationships entered in the Person Relationships window. Then the **Activate** button is displayed in the Dependents tab, by default.

Once you enter the end date for a dependent relationship, you can terminate the relationship in the Terminate/Activate Dependent window, but cannot reactivate it.

Prerequisites

Person types are defined.

Visa types, country codes, and funding sources are defined.

Dependent information is defined.

Navigation

Person Reference > Details > Residency/Citizenship Details

Steps

To activate or terminate dependent details:

1. Query the appropriate person record in the Residency/Citizenship Details window.
2. In the Dependents tab, click **Activate** to activate the relationship in the Terminate/Activate Dependent window.
3. Save your work and click **Back** to return to the Residency/Citizenship Details window. The window now displays the **Terminate** button in place of the **Activate** button.
4. Click **Terminate** to terminate a relationship and specify the reason for termination in the Terminate/Activate Dependent window.

You cannot activate and terminate a relationship on the same day.

5. Save your work and click **Back** to return to the Person International Details window. Now the window displays the **Activate** button in place of the **Terminate** button.

11.4.3 Entering Non-immigrant Student and Exchange Visitor Details

Educational institutions in the United States are required to capture information on non-immigrant and exchange students and transfer this data to SEVIS.

SEVIS uses this data to transmit any change in the profile of an international or exchange visitors, such as admission at the Port of Entry (POE), program extensions, employment notifications, and changes in program of study is immediately reported to the Government agencies.

As per SEVIS requirements, your institution must be able to identify and send notification when any of the following occurs:

- Non-immigrant students, holding specific visa types, are authorized to drop below a full-time enrollment status
- Students return to a full-time enrollment status

To meet these requirements, Oracle Student System provides a functionality to enforce full-time program enrollment by ensuring that students have minimum number of credits or have forced attendance. In addition, you can perform the following tasks to meet the requirements:

- Create a special enrollment category for nonimmigrant students to enforce these guidelines
- Create Person ID groups for specific students
- Override existing final minimum credit or forced attendance type validations for the person ID group
- Provide a government-defined code specifying the reason for authorizing nonimmigrant students to drop below the configured full-time enrollment

Prerequisites

International Person Details exist.

US Profile is set.

Navigation

Person Reference > Person Details

Steps

To enter I-20 form details:

1. Query the appropriate person number in the Residency/Citizenship window.

2. Click **Nonimmigrant Student** to enter details of I-20 form, program, funding, employment, and action taken for international students in the Nonimmigrant Details window. If the visa type is F1, you can choose from the following educational levels:

- Associate
- Bachelors
- Doctorate
- High school
- Language testing
- Masters
- Primary
- Secondary

If the visa type is M1, you can choose from educational levels of flight training, high school, other, and other vocational school.

The primary and secondary major fields are disabled in the Program tab for a visa type of M1.

The status of the I-20 defaults to **Active**. Based on the action taken, it can be **Terminate** or **Complete**.

The Action tab is enabled only when the I-20 effective date is earlier than or the same as the current date. If the action taken is to complete or terminate a program, you cannot update other details in the record except for print details. In the Program tab, if the educational level is Other, you must enter the comments.

3. In the Employment tab, enter the employment details, save your work, and click **Create Employer** to enter the employer details in the Institutions window. This tab is enabled only when the I-20 effective date is earlier than or the same as the current date.
4. Save your work and return to the Residency/Citizenship Details window.
5. Click **Exchange Visitor** to enter details of exchange visitors in the Person Exchange Visitor window. This button is enabled only if the profile IGS: Country Code is set to US at the time of installation. A person can have either an active I-20 record or an active EV record at any given point of time and not both.

The program, funding, and site of activity details are entered in that order. Save your work after each entry.

The Action tab is enabled only when the exchange visitor effective date is earlier than or same as the current date.

You cannot update the Create Region in the Details tab and the Began Program check box if the exchange visitor effective date is equal to or less than the current date.

If the action taken is to terminate an exchange visitor or to end a program, you cannot update other details in the record except for Site of Activity and print details.

6. Save your work.

11.4.4 Entering Citizenship and Funding Details

You can enter citizenship and funding details for an international student in the Residency/Citizenship Details window.

Prerequisites

International Person Details are defined.

Navigation

Person Reference > Details > Residency/Citizenship Details

Steps

To enter the citizenship details:

1. Query the appropriate person record in the Residency/Citizenship Details window.
2. In the Citizenship tab, enter the following:
 - Citizenship status of the person from the list of values.
 - Citizenship status effective start and end dates.
 - Optionally, enter the country of citizenship, proof of citizenship document provided, reference details of the document. If the person surrendered the citizenship, specify the date when the citizenship was disowned, and enter the effective start and end dates for the citizenship.

- Select the country of legal permanent citizenship, the number of the document provided as proof of citizenship, and the associated start and end dates.
3. Save your work.
 4. In the Funding tab:
 1. Select the fund source from the list of values and specify the fund source.
 2. Optionally, specify the fund amount and the relationship between the person and the funding source.
 5. Save your work.

11.5 Person Holds

You can apply holds on persons when they do not satisfy institutional requirements. A hold can be associated with different *hold type effects*. A hold type effect determines the consequence of applying an associated hold. For example, to prevent a student from ordering transcripts, you must define a hold type during setup with that effect.

Holds types can be categorized as *Administrative* or *Academic*. Administrative holds are applied when a student fails to meet administrative requirements, such as paying fees. You may apply one or more administrative holds on a student account. For instance, you can apply a hold that prevents all refunds, and another to block all study material. Academic holds are applied when a student's academic progress does not meet program or unit requirements. You can only apply administrative holds through the Person subsystem. However, you can view academic holds.

For more information on setting up a hold type, see the *Oracle Student System Implementation and Administration Guide*.

You can also apply external administrative holds through third-party software. Such holds can be released or applied only by the external system used to create these holds. The external system notifies Oracle Student System of these holds and Oracle Student System in turn restricts the student accordingly. You can define values to identify the external systems that create holds in Oracle Student System. Examples of such values are Parking and Library.

You use the Set or Release External Holds workflow to facilitate the application and release of external holds. The external system subscribes to the "oracle.apps.igs.pe.exthold" business event to trigger the workflow and process the hold. The workflow validates the parameters and applies or releases hold on

students. Successful processing raises the "oracle.apps.igs.pe.extholdss" business event, failure raises the "oracle.apps.igs.pe.extholdfl" business event.

For information about this business event, see Appendix B, *Workflow in Oracle Student System Implementation and Administration Guide*. For information on creating workflows for business events, see *Oracle Workflow Guide*.

11.5.1 Viewing Person Hold Details

You can view, apply and release holds. You can also view and maintain holds effect using the Person Hold Details window.

Prerequisites

Hold types are defined.

Navigation

Person Reference > Holds > Person Hold Details

Steps

To view the holds applied to a person:

1. Query for the appropriate person number in the Person Hold Details window.
2. Select the Academic radio button to view academic holds.
3. Select the Administrative radio button to view administrative hold.
4. Select the Both radio button to view either types of hold categories.
5. Select the Include Expired Holds check box to view expired holds.
6. Click **Hold Effects History** to view the system hold effect type.

11.5.2 Viewing Person and System Hold Type Effects

You can view the hold type effects in the Person Hold Types window and the System Hold Effect Types window. Each person hold type is associated with either an academic or administrative hold category and a hold type effect.

System hold types are built-in hold types and can be applied at a program level. System hold types are categorized into various levels based on the severity of the hold effect. For example, a system hold type that prevents all academic services to a student can be a higher level (level 3) system hold type. Whereas, a system hold

type that prevents a student from ordering transcripts can be a lower level (level 1) system hold type.

You cannot attach two system hold type effects with different levels to a single hold type.

Prerequisites

System hold types must exist.

Person hold types must exist.

Navigation

Person Reference > Holds > Hold Type Effects

Person Reference > Holds > System Hold Effect Types

Steps

To view hold type effects:

1. Query the appropriate person number in the Person Hold Details window and select **Hold Effects History**.

The Hold Type Effects window displays showing the effect of the hold applied to the person.

2. To view the system hold type effects, query the System Hold Effect Types window.

11.5.3 Applying Person ID Holds

You can apply person holds manually in the Person Hold Details window. You must have an Oracle Student System person type of staff and a customer party attached to your name to apply holds manually.

To apply holds on a group of persons or a person ID group, you must run the Set Person ID Group Holds concurrent process.

Prerequisites

Hold authorizer must have an assigned responsibility of person type of Staff.

Hold types are defined.

Navigation

Person Reference > Holds > Person Hold Details

Requests > Concurrent Manager > Requests > Run > Single

Steps

To manually apply a hold:

1. Query the appropriate person number in the Person Hold Details window.
2. Select a hold type from the list of values and specify the term or start date when you want to apply the hold.

The External Reference field is enabled only when in case of external hold.

3. Specify the start date and the expiration date of the hold.
4. Save your work.
5. Click **Hold Effects History** to view the system hold effect types applied to the person.
6. Click **Hold Effects Maintenance** and enter the expiration date in the Hold Effects Maintenance window to expire the hold effects.

If the expiration dates of the hold effects are later than the hold type expiration date, they are updated with the hold type expiration date.

You cannot enter an expiration date for an external hold.

To specify an expiration date for the hold effect, you must have the same responsibility as the user who applied the hold.

To apply a hold to a group of persons:

7. Run the Set Person ID Group Holds concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

8. To set the parameters, reference the following table.

The following table describes the parameters for the Set Person ID Group Holds concurrent process.

Table 11–3 Set Person ID Group Holds Concurrent Process Parameters

Parameter	Description
Hold Type	Select the hold type to be applied. This is a mandatory parameter.
Person ID Group	Select the person ID group. This is a mandatory parameter.
Start Date	Enter the start date of the hold.
Term	Enter the term for which the hold is applied.

Additional Notes

When a hold type is expired, the corresponding hold effects will inherit the same date of expiration. If the hold effects are expired separately, the hold type expiration date is updated with the latest hold effect expiration date. This happens only if all of the hold effects have an expiration date.

To create business events for external hold expiration ("oracle.apps.igs.pe.exthold") business event, use the following parameters:

- P_PERSON_NUMBER
- P_HOLD_TYPE
- P_START_DT
- P_END_DT
- P_EXTERNAL_REFERENCE
- P_ADMIN

Parameters for the "oracle.apps.igs.pe.extholdfl" business event are:

- P_PERSON_NUMBER
- P_HOLD_TYPE
- P_START_DT
- P_END_DT
- P_ERROR

11.5.4 Releasing Person ID Holds

You can release person holds manually in the Person Hold details window. To release holds for a group of person, run the Release Person ID Group Holds concurrent process.

The Release Person ID Group Holds Concurrent Process enables users to release Person ID group holds based on parameters such as hold type, Person ID group, start date, expiration date, and term.

Prerequisites

Person holds are applied.

The person releasing the hold must have the same responsibility as the one applying the hold.

Navigation

Person Reference > Holds > Person Hold Details

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

To release holds manually:

1. Query the appropriate person number in the Person Details window.
2. Select the hold expiration date in the Person Hold Details window for the hold you want to release.
3. Save your work.

To release holds for a group of persons:

4. Run the Release Person ID Group Holds concurrent process.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

5. To set the parameters, reference the following table.

The following table describes the Release Person ID Group Holds concurrent process parameters.

Table 11–4 Release Person ID Group Holds Concurrent Process Parameters

Parameter	Description
Hold Type	Select the hold type to be released. This is a mandatory parameter.
Person ID Group	Select the Person ID group for which the hold is to be released. This is a mandatory parameter.
Start Date	Enter the start date of the hold release.
Expiration Date	Enter the expiration date of the hold release.
Term	Enter the term for which the hold is released.

- To view the history of hold effects, click **Hold Effects History** in the Person Hold Details window.

11.6 Tracking

Tracking enables you to monitor the progress of a student through a set of processes before the student is admitted or awarded a degree. For example, the student assessment process can be tracked through the following steps:

- Assignment received from student
- Sent to assessor
- Received from assessor
- Returned to student

A group of steps constitutes a *tracking type*. You can use tracking types to define requirements or steps for a process. You can create your own tracking types and attach them to the system-defined types.

Attached to each tracking type are requirements or tracking steps, to be checked at different stages. For example, the basic requirements tracking type may have associated steps such as GRE test scores, letter of recommendation and transcripts. You can use tracking step catalogs, comprising a group of steps to prevent the creation of duplicate steps for the same process and to facilitate easy usage.

Sometimes tracking steps in a group are interchangeable and the completion of one does not require the completion of the other. For example, an institution may

require a GRE or a GMAT test for the applicants. If either one is completed, the tracking item is complete. Tracking step groups comprising similar steps are created for this purpose.

Each tracking type is further attached to a *tracking item*. A tracking item is a document or process being monitored that is either manually created or initiated by processes within other subsystems. The steps associated with a tracking type are inherited by tracking items of that type when the items are created.

When a tracking type is defined, the associated tracking steps are assigned a step group ID to facilitate a logical combination of steps into a group. A step group limit is also defined that indicates the number of steps in the group to be completed before completing the tracking item.

For example, in admissions, an application sometimes requires submission of more than one personal statement. A tracking item is created for the application to track these statements. These statements can be placed in a *step group* with an associated step group ID. Each step group ID has a limit, which must be met before an application is considered to be complete.

When two or more tracking steps belong to the same group, completing one step automatically completes them all. Target days defined for a tracking type represent the elapsed time for completion of a tracking item.

The tracking process can be completed without all of its steps having been performed where performing the remaining steps is no longer required or where a cancellation of the tracking item is required. Steps can be sequential, forcing the order in which they must be completed, or nonsequential.

The tracking item action date is calculated based on business days and sequential days. The option of business days takes into consideration only the working days. If sequential is selected, the action date for the first step becomes the start date for the following step. If business days and sequential are selected, the action date is calculated as earlier, but considering business days only. The completion due date for a tracking item is equal to the sum of tracking item start date and the number of target days.

Oracle Student System automatically initiates the tracking process when a student applies for admission.

The following table describes examples of system-initiated tracking items.

Table 11–5 System-Initiated Tracking Items

Subsystem	Tracking Item
Admissions	Applications for admission can be monitored through the approval and offer process.
Admissions	Rejected offers can be monitored if the application for admission will be considered for other program preferences in subsequent rounds.
Advanced Standing	Manually-assessed advanced standing applications can be tracked through the approval process.
Assessments	Applications for extensions to due dates of assessment items can be recorded individually and monitored.
Assessments	Preparation and printing of examination papers and mark sheets can be monitored.
Assessments	Each application for special consideration in the determination of results can be tracked.
Assessments	Applications for review of student unit attempt outcomes, or results, can be individually tracked.
Research	Tracking thesis examinations and thesis panel members.

11.6.1 Creating Tracking Items

Tracking items are manually recorded in the Tracking Items window. The following details are recorded:

- Status of the tracking item
- Tracking type of the tracking item
- Person who is the subject of the tracking item, if applicable
- Tracking item's originator
- Steps involved in the process being tracked

Each tracking item is recorded with a Completion Required By date. The date is calculated by the system as the tracking item's start date plus the number of target days for its tracking type, as specified in the Tracking Item Notes window.

Each tracking item should be associated with a set of tracking steps defined during setup. A tracking type associated with a tracking item can have a set of default tracking steps. The set of default steps can be modified by adding new steps or deleting existing steps.

Every step is assigned an action date and a recipient. For default steps, the action date is inserted by Oracle Student System and is calculated as follows:

- For nonsequential steps, the tracking item's start date plus the action days allowed for that step to be performed, as defined in the Tracking Item Notes window

An action date must be manually calculated and entered for steps that are added.

- For sequential steps, the tracking item's start date plus the action days for any previous steps plus the action days allowed for that step to be performed, as defined in the Tracking Item Notes window

The following table describes the fields in the Tracking Types window.

Table 11–6 Tracking Types Window Field Description

Field Name	Description
Tracking Type	Institution-defined type used to assist in identifying and classifying items being tracked. These are mapped back to system-defined tracking types recognized for system functionality
Description	Description of the tracking type description
System Tracking Type	Value recognized by the system for specific functionality; each institution-defined tracking type is mapped to a system tracking type
Target Days	Indicates the maximum number of days required to complete all steps. Target days are used in conjunction with the Business Days Only indicator to calculate the Completion Required By date for an item
Business Days Only Indicator	If selected, calculates tracking item completion dates based on business days only
Publish	If selected, displays published steps and the specified item
Sequential	If selected, determines whether an item's tracking steps must be completed in sequence, and whether calculated action dates for tracking steps are progressive
Closed	If selected, prevents further use of the tracking type
[Data Coordination Check Box]	If selected, data in the Tracking Types window is automatically refreshed and coordinated. If deselected, data in the Tracking Types window is refreshed only when the user clicks in the Tracking Type Steps region. Leave deselected to speed up performance when querying records.

Table 11–6 (Cont.) Tracking Types Window Field Description

Field Name	Description
Step	Activity required to process a tracking item and identified by a system generated number. This number represents an imposed order for step completion when the Sequential indicator is set. If not, tracking steps can be completed in any order
Catalog Code	Code used when populating steps for Tracking Types
Description	Catalog code description
Step Group ID	Sequence number used as an identifier for tracking step groups
Action Days	Specifies the normal maximum number of days to complete a tracking step for tracking items in conjunction with Sequential and Business Days Only indicators
Recipient	Person number and name to whom the tracking item is sent for a particular step
Find Person	Opens Find Person window
System Step Type	System-defined step type assigned to a tracking type
Publish Step	If selected, publishes tracking step type
Update Group Limit	Opens the Step Group Limits window
Tracking Type Step Notes	Opens the Tracking Type Step Notes window

Prerequisites

Tracking types and statuses are defined.

Navigation

Person Reference > Tracking > Items

Steps

To create tracking items:

1. Enter the tracking type from the list of values in the Tracking Items window.
2. Select the tracking status from the list of values defined during setup.
3. Enter the tracking item subject and the tracking item originator. You can use the Find Person icon to look for a subject or an originator.

4. The item completion due date is calculated and displayed based on the target days and the action days specified from the tracking type.

You cannot create a tracking item with a tracking type associated with closed tracking steps attached.

5. If Override Offset Calculation is selected in the Tracking Items window, you can change the completion due date, the action date for the tracking step is updated with this date. This option is available only when business days only and sequential have not been selected.

The tracking status is disabled once the tracking item is created. When all the steps are complete, the tracking status gets enabled.

6. Save your work. The tracking ID is automatically created.

The option to override offset calculation is disabled once the tracking item is created.

11.6.2 Viewing the Progress of Tracking Item

Once a tracking item is created, you can track the progress of each tracking item based on the number of steps completed. This information is recorded by Oracle Student System and displayed in the Tracking Items window. To view this information, you must select the Step Completion check box which causes the current date to be recorded as the completion date. This completion date can be overridden.

When all tracking steps of a tracking item are complete, the completion date of the last step is automatically recorded as the completion date of the item. The status of the item is manually set to **Complete**.

Prerequisites

Tracking Items are created.

Navigation

Person Reference > Tracking > Items

Steps

To view the progress of a tracking item:

1. Query the appropriate tracking type in the Tracking Items window.

2. The tracking process can be completed without all steps being performed if the remaining steps are no longer required, or a tracking item is cancelled.
3. To end the tracking process, click **Early Exit** in the Tracking Items window and click an appropriate tracking status when prompted. Incomplete steps have the Bypass indicator checked, and the completion date of the tracking item is set to the current date.
4. Save your work.

11.6.3 Viewing the Status of Tracking Items

You can determine the status of a tracking item in the Tracking Items window. Querying by attributes other than tracking ID is likely to return multiple records. When the required record is located, its tracking steps are displayed.

Progress of a tracking item is determined by the following institution-defined statuses:

- **Active** - indicating the tracking item is initiated and is in progress
- **Cancelled** - indicating the tracking item was completed by the item originator before all steps were completed. The system sets any incomplete steps to **Bypassed** status.
- **Complete** - indicating all tracking item steps are complete or bypassed

Tracking statuses are applied to both tracking items and tracking groups to indicate the current state of activity.

Prerequisites

Tracking statuses are defined.

Navigation

Person Reference > Tracking > Items

Steps

To view the status of the tracking items:

1. Query the appropriate tracking type in the Tracking Items window.
This displays the Tracking Items window showing all the tracking details.
2. You can change the status of a tracking item if the tracking item is not in the **Complete** status.

3. You can change the tracking item originator details along with the tracking item status.
4. Save your work.

11.6.4 Creating Tracking Groups

A *tracking group* is set up with a description that indicates its purpose. Tracking items can be grouped according to a common characteristic, such as all special consideration applications for a specific unit, all advanced standing applications received in a specific week, and all admission applications for a specific program.

Individual tracking items with common characteristics can be made members of tracking groups. The Tracking Groups Member region is used to add tracking items, query the members of a group, and monitor a group's progress. Tracking items can be deleted from the membership of a tracking group.

For example, a tracking item is created to monitor the progress of a student's application for special consideration in a specific unit. In order to ensure that all such applications for the unit are handled by the unit assessor, they are managed as a group of applications. A tracking group is set up and the tracking item for the student's application is made a member of the group. Progress of the group is monitored to ensure that all similar applications are handled in the required time frame.

A tracking group has the status **Active** if it has one or more open tracking items and the status **Complete** if all tracking items are complete or cancelled. Tracking item records that belong to one or more groups have a *Group Member* lamp displayed in the corner of the Tracking Items window.

Prerequisites

Tracking Items are defined.

Navigation

Person Reference > Tracking > Groups

Steps

To create a tracking group:

1. Enter the name of the group you want to create in the Tracking Groups window.

2. Select the tracking item ID in the Tracking Group Members region. You can add as many tracking items that you require in this group.
3. Save your work. A tracking group ID is automatically assigned to the group.
4. Click **Tracking Group Notes** to associate any notes with the group.

This displays the Tracking Group Notes window showing details of all the notes associated with this group.
5. Save your work.
6. Click **Edit Notes** if you need to make any changes to existing notes.
7. Save your work and return to the Tracking Items window.
8. Click **Tracking Item Group Membership** to include tracking groups under a common tracking ID.

This displays the Tracking Item Group Membership window showing all the group membership details.
9. Click Maintain Tracking Groups in the Tracking Item Group Membership window and modify tracking groups by adding or deleting items.
10. Save your work.

11.6.5 Recording Tracking Notes

Institution-defined tracking note types categorize notes in the Tracking subsystem, and are recorded in the Tracking Note Types window. Notes are categorized by one of the following types:

- **Purpose**, for notes describing the purpose of a tracking step
- **Support**, for notes describing documentation received in support of a tracking item
- **Comment**, for notes describing the performance of a tracking step

You can use note to record detailed information about the following:

- Tracking items
- Tracking steps
- Tracking groups
- tracking type steps
- tracking step catalogs

You can use note to record the purpose of tracking steps, documentation received in support of tracking items, and description of the performance of tracking steps.

For more information on tracking steps catalog and tracking steps notes, see *Oracle Student System Implementation and Administration Guide*.

Prerequisites

Tracking items are defined.

Tracking steps are defined.

Tracking groups are defined.

Navigation

Person Reference > Tracking > Items

Person Reference > Tracking > Groups

Steps

To attach notes to tracking items:

1. Click **Tracking Item Notes** in the Tracking Items window. This displays the Tracking item Notes window showing all the tracking items.
2. Enter a new note or modify an existing note.
3. Save your work.
4. Click **Edit Notes** if you need to make any changes to existing notes.
5. Save your work and return to the Tracking Items window.

To attach notes to Groups:

6. Click **Tracking Group Notes** in the Tracking Groups window. This displays the Tracking Group Notes window showing all the tracking groups.
7. Click **Edit Notes** if you require to make any changes to the existing notes.
8. Save your work and return to the Tracking Groups window.

11.6.6 Generating Tracking Item Report

The Tracking Item Report concurrent process lists tracking items of a particular type(s). This concurrent process can be run for a specific originator or other

combinations of parameters. Details include tracking item steps and associated action and completion dates, overdue information, and tracking groups.

Prerequisites

Tracking items are created.

Tracking groups are defined.

Tracking statuses are defined.

Navigation

Requests > Concurrent Manager > Requests > Run > Single Request

Steps

1. Run the Tracking Item Report concurrent process parameters.

For information on running a concurrent process, see [Concurrent Process Procedures](#).

2. To set the parameters, reference the following table.

The following table describes the parameters for the Tracking Item Report concurrent process.

Table 11–7 Tracking item Report Parameters

Parameter	Description
Comment	Comment that appears on header page of report
Tracking Type	Institution-defined classification of tracking items that map to system-defined tracking types
Tracking Status 1	Institution-defined status of tracking items that map to system-defined tracking types
Tracking Status 2	Institution-defined status of tracking item mapped to system tracking status
Tracking Status 3	Institution-defined status of tracking item mapped to system tracking status
Originator	Originator of the tracking item
Recipient	Registration ID and name of person to whom tracking item is sent for particular step
Overdue days	Overdue days; offers an all or null value that can be selected

Table 11–7 (Cont.) Tracking item Report Parameters

Parameter	Description
Tracking Groups	Name of the tracking groups
Tracking Items	Document or process monitored by Tracking subsystem
Sort By	Sort by; six sorting variations with ascending and descending options available including: <ul style="list-style-type: none">■ Tracking Type, Originator, Overdue Days-Desc■ Tracking Type, Originator, Target Date-Asc■ Tracking Type, Overdue Days-Desc, Originator■ Tracking Type, Target Date-Asc, Originator■ Tracking Type, Tracking Item Start Date-Asc, Originator■ Tracking Type, Tracking Status, Originator
Tracking Start Date Range Form	Date from which the tracking items are to be reported. This is a mandatory parameter.
Tracking Start Date Range To	Date from which the concurrent process will consider tracking items for reporting
Completion Required from Date	Date from which all the completed tracking items are to be reported. These next two dates are the range to report based on Completion Dates for the Tracking Item. This is a mandatory parameter.
Completion Required to Date	Date until which all the completed tracking items are to be reported.
Completion Start Date	Date from which all the completed tracking items are to be reported. These next two dates are the range to report based on Completion Dates for the Tracking Item.
Completion End Date	Date until which all the completed tracking items are to be reported

Correspondence

Correspondence functionality uses Oracle Student System processes together with Oracle Customer Relationship Management (CRM) products to facilitate the creation of correspondence items.

Oracle Student System provides an integrated correspondence system using CRM modules, such as Oracle One-to-One Fulfillment and Interaction History to set up and dispatch correspondence items to designated recipients.

This chapter details the following topics:

- [What's New in This Release](#)
- [Correspondence Overview](#)
- [Creating Document Mapping and Attributes](#)
- [Viewing Correspondence Interaction History](#)
- [Running Correspondence Concurrent Processes](#)
- [Generic Ad Hoc Letter Concurrent Process](#)
- [Generic Ad Hoc Letter - SQL Query](#)
- [Generic Ad Hoc Letter - Sample Output](#)
- [Admissions Ad Hoc Letter Concurrent Process](#)
- [Enrollment Ad Hoc Letter Concurrent Process](#)
- [Financial Aid Ad Hoc Letter Concurrent Process](#)
- [Student Finance Ad Hoc Letter Concurrent Process](#)
- [Admissions - Acknowledgement Letter Concurrent Process](#)
- [Admissions - Acknowledgement Letter - SQL Query](#)

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- Admissions - Acknowledgement Letter - Sample Output
 - Admissions - Admissions Letter Concurrent Process
 - Admissions - Admissions Letter - SQL Query
 - Admissions - Admissions Letter- Sample Output
 - Admissions - Admit to Future Term Letter Concurrent Process
 - Admissions - Admit to Future Term Letter - SQL Query
 - Admissions - Admit to Future Term Letter - Sample Output
 - Admissions - Conditional Offer Letter Concurrent Process
 - Admissions - Conditional Offer Letter - SQL Query
 - Admissions - Conditional Offer Letter - Sample Output
 - Admissions - Future Term Second Admission Letter Concurrent Process
 - Admissions - Future Term Second Admission Letter - SQL Query
 - Admissions - Future Term Second Admission Letter - Sample Output
 - Admissions - Missing Items Letter Concurrent Process
 - Admissions - Missing Items Letter - SQL Query
 - Admissions - Missing Items Letter - Sample Output
 - Admissions - No-Quota Letter Concurrent Process
 - Admissions - No-Quota Letter - SQL Query
 - Admissions - No-Quota Letter - Sample Output
 - Admissions - Post Admission Missing Items Letter Concurrent Process
 - Admissions - Post Admission Missing Items Letter - SQL Query
 - Admissions - Post Admission Missing Items Letter - Sample Output
 - Admissions - Rejection Letter Concurrent Process
 - Admissions - Rejection Letter - SQL Query
 - Admissions - Rejection Letter - Sample Output
 - Admissions - Residency Letter Concurrent Process
 - Admissions - Residency Letter - SQL Query
 - Admissions - Residency Letter - Sample Output

- [Admissions - Waitlist Letter Concurrent Process](#)
- [Admissions - Waitlist Letter - SQL Query](#)
- [Admissions - Waitlist Letter - Sample Output](#)
- [Admissions - Interview Details Letter Concurrent Process](#)
- [Admissions - Interview Details Letter SQL Query](#)
- [Admissions - Interview Details Letter Sample Output](#)
- [Admissions - Admit No Response System Letter Concurrent Process](#)
- [Admissions - Admit No Response System Letter SQL Query](#)
- [Admissions - Admit No Response System Letter Sample Output](#)
- [Financial Aid - Award Notification Letter](#)
- [Financial Aid - Award Notification Letter - SQL Query](#)
- [Financial Aid - Award Notification Letter - Sample Output](#)
- [Financial Aid - Loan Disbursement Letter](#)
- [Financial Aid - Loan Disbursement Letter - SQL Query](#)
- [Financial Aid - Loan Disbursement Letter - Sample Output](#)
- [Financial Aid - Missing Items Letter](#)
- [Financial Aid - Missing Items Letter - SQL Query](#)
- [Financial Aid - Missing Items Letter - Sample Output](#)

12.1 What's New in This Release

In this release, Oracle Student System has the following new and modified features:

- [Admission Interview Details System Letter](#)
- [Admit No Response System Letter](#)
- [Multiple Delivery Types for Correspondence Letters](#)
- [Person ID Group](#)
- [Profile Options](#)

12.1.1 Admission Interview Details System Letter

The current release introduces an Admission Interview Details System Letter that is used to inform the applicants that they have been shortlisted for an interview. The details of the letter include the place, date, and time of the interview.

12.1.2 Admit No Response System Letter

The current release introduces an Admit No Response System letter that is sent to applicants who have failed to respond to the admission offer letter within the response deadline.

12.1.3 Multiple Delivery Types for Correspondence Letters

The current release provides greater flexibility by introducing multiple delivery types for sending correspondence letters. You can send a letter through one of the following:

- E-mail/Fax
- E-mail
- E-mail/Fax/Print
- E-mail/Print
- Fax
- Fax/Print
- Print

12.1.4 Person ID Group

Person Id group is introduced as a new parameter in all the Correspondence concurrent processes and allowing user to select 'G' as one of the selection criteria. When you select the 'G' Person ID Group and Group in Person ID group parameter, the application will execute the Dynamic SQL (in the case Dynamic Group) or selects all the students (in the case Static Group) and submit correspondence request for each of them.

12.1.5 Profile Options

A new delivery type Fax has been introduced for all the concurrent processes.

A profile option IGS: Fax Destination Number has been introduced. If fax is selected as a delivery type in a concurrent process and parameter value is not provided for it, the value is taken from the one specified in the profile option. If no value is specified in the profile option, an error message is displayed stating that the parameter is missing.

12.2 Correspondence Overview

Correspondence is an integral part of institutional interaction with students. Correspondence can take many forms, such as letters, brochures, and application forms. The Correspondence System facilitates distribution of correspondence items to students using an appropriate mode of communication. These correspondence items are system generated and ad-hoc letters.

Correspondence works with CRM features and tools, specifically One-to-One Fulfillment and Interaction History to setup and dispatch correspondence items to enable recruiters to reach out to prospective and current students.

A basic document in CRM Fulfillment is a letter typed into Oracle Content Manager (OCM). You can define complex documents by including text placeholders in the document. These placeholders are replaced by data or information extracted from Oracle Student System tables through an SQL query defined in Oracle One-to-One Fulfillment and attached to letters. An SQL query is a statement that collects specific data from the database when fulfilling a request to dispatch a master document.

Each letter is mapped to a concurrent process run in Oracle Student System.

See [Chapter 3, Oracle System Administration and Other Setup, Correspondence Printing](#) in the *Oracle Student System Implementation and Administration Guide* for information about setting up OCM to use with Oracle Student System.

See *Oracle Content Manager Implementation Guide* for information about setting up Oracle Content Manager.

See *Oracle Content Manager User Guide* for information about creating letters.

Student information is entered and processed in Oracle Student System. To send correspondence items to students, a concurrent process is run in Oracle Student System. This concurrent process invokes and executes a request for correspondence in CRM.

The correspondence items - *master documents* and *recipient lists* - are set up in Oracle One-to-One Fulfillment. Correspondence concurrent processes are run to send the desired items to students.

The master documents used for correspondence and the recipient list are created in CRM. Mapping of master documents and attribute assignment to them is part of the OSS - CRM integration correspondence process. The master documents defined in CRM are mapped to system letter codes in Oracle Student System. The document types can be either system letter or ad hoc.

When a concurrent process is run, this mapping of the documents helps the application display only those documents belonging to the specified system letter code in the concurrent process parameter window.

Interactions with students in the form of correspondence are recorded and stored in CRM Interaction History. An extension to CRM Interaction History is provided in Oracle Student System. This extension maintains interaction-related information specific to Oracle Student System. The Correspondence Interaction History window stores the details related to student correspondence. Administrators can view information like document name and type, date sent, program code, and award year applied for by the student.

12.3 Creating Document Mapping and Attributes

The master documents used for correspondence and the recipient list are created in CRM. The master documents defined in CRM are mapped to system letter codes in Oracle Student System. The document types can be either *system letter* or *ad hoc*. When a concurrent process is run, this document mapping helps the application to display only those documents belonging to the specified system letter code in the concurrent process parameter window.

Administrators can also assign attributes to these documents. These attributes include the number of times a letter can be sent and elapsed days before which administrators can resend the letter.

The master documents defined in CRM are mapped to system letter codes in Oracle Student System during implementation. Use the Mapping and Attributes window to map any new or additional letters that you want to create.

For more information on setting up the Mapping and Attributes window, see *Oracle Student System Implementation and Administration Guide*.

This topic is further divided into:

[Viewing Collateral and Attachments](#)

[Sending Test Mail](#)

Prerequisites

Correspondence letters are created in One-to-One Fulfillment.

Navigation

Correspondence > Mapping and Attributes

Steps

1. Enter data in each field of the window as described in the table and save your work.

The following table describes the Mapping and Attributes window.

Table 12–1 Mapping and Attributes Window Description

Field Name	Type	Features	Description
Mapping Type	Required	List of values	<p>Master document or a list of people to whom correspondence is sent.</p> <p>Note: If mapping type is List, administrators cannot enter number of repeats, elapsed days, and attribute description in the Attributes region.</p>
Document Type	Required	List of values	<p>System letter or ad hoc letter</p> <p>System letters can be acknowledgement letters or rejection letters with a student recipient list attached.</p> <p>Ad hoc letters can be brochures, newsletters, prospectus, or other customer-related information.</p>
Document/List Name	Required	List of values	<p>Document or recipient list name created in CRM</p> <p>Note: If mapping type is document, list of values displays only document names. If mapping type is list, list of values displays only recipient list names.</p>
Closed	Optional	Check box	If selected, prevents further use of document or list.

Table 12–1 (Cont.) Mapping and Attributes Window Description

Field Name	Type	Features	Description
Document/List Description	Display only	N/A	Description of document or list.
System Letter Code	Required	List of values	<p>Oracle Student System system letter code to which document is mapped.</p> <p>Note: If system letter code is Financial Aid type, administrators cannot enter number of repeats, elapsed days, and attribute description in the Attributes region.</p>
[Description]	Display only	N/A	System letter code description.
Mapping Description	Optional	N/A	<p>Description of mapping. This is useful when, for example, administrators want to differentiate between two acknowledgement letters.</p> <p>Note: This becomes a subject line if mapping type is Document type mapping.</p>
View Attachment	Optional	Button	Enabled only for document type mapping and not list mapping. Information is display-only.
Send Test Mail	Optional	Button	Enabled only for document type mapping and not list mapping. Information is display-only.
Elapsed Days	Optional	N/A	<p>Number of elapsed days before which administrators can resend the document; disabled for List mapping and Financial Aid letter mapping.</p> <p>Note: Administrators can override the number of elapsed days if the Override Flag in the concurrent process is Yes.</p>
Number of Repeats	Optional	N/A	Number of times administrators can resend the document.
Description	Optional	N/A	Attribute description.

12.3.1 Viewing Collateral and Attachments

Collateral and attachments are created and added in One-to-One Fulfillment through OCM Attachments and OCM E-mail Deliverables. You can view the collateral and attachments mapped to a correspondence letter in the Collateral and Attachments window.

Prerequisites

Templates are created in One-to-One Fulfillment.

Collateral and attachments are created in One-to-One Fulfillment through OCM Attachments and OCM E-mail Deliverables.

Navigation

Correspondence > Mapping and Attributes > View Attachments

Steps

1. View data in each field of the window as described in the table and save your work.

The following table describes the Collateral / Attachment Information window.

Table 12–2 Collateral / Attachment Information Window Description

Field Name	Type	Features	Description
Template Name	Display only	N/A	Name of correspondence letter selected in the Mapping and Attributes window.
Collateral	Display only	N/A	Displays the collateral mapped to the correspondence letter in OCM.
Attachments	Display only	N/A	Displays the attachments mapped to the correspondence letter in OCM.
Back	N/A	Button	Returns you to the Mapping and Attributes window

12.3.2 Sending Test Mail

You can send a test mail to ensure that you have set up the correspondence letter correctly. While sending test mail, you must provide an e-mail address and a description for the subject line. Test mail will not replace merge fields with actual data values and is not stored for any future reference.

Prerequisites

Templates are created in One-to-One Fulfillment.

Mapping Record is saved to enable Send Test Mail.

Navigation

Correspondence > Mapping and Attributes > Send Test Mail

Steps

- 1. Click **Send Test Mail**.
You cannot send a test mail to someone with a **Closed** record.
- 2. Enter an address in the Recipient E-mail Address field and an optional description.
- 3. Click **Submit**.

12.4 Viewing Correspondence Interaction History

You can view the correspondence history between educational institutions and persons in the Correspondence Interaction History window.

For information on resending correspondence letters, see [Resending Correspondence Letters](#).

Prerequisites

Templates are created in One-to-One Fulfillment.

Collateral and attachments are created in One-to-One Fulfillment through OCM Attachments and OCM E-mail Deliverables.

The appropriate concurrent process is run for a student.

Navigation

Correspondence > Correspondence Interaction History > Correspondence Interaction History

Steps

- 1. Enter data in each field of the window as described in the table and save your work.

The following table describes the Correspondence Interaction History window.

Table 12–3 Correspondence Interaction History Window Description

Field Name	Type	Features	Description
Person Number	Display only	N/A	Person number
[Preferred Alternate ID]	Display only	N/A	Preferred alternate ID for person
Full Name	Display only	N/A	Full name
Sex	Display only	N/A	Person's gender
Date of Birth	Display only	N/A	Person's date of birth
[Sort By]	Required	Radio button	Sort by: document name, system letter code, document type or date sent, requested date, status
Document Name	Display only	N/A	Correspondence letter name
Document Type	Display only	N/A	Document type: system letter or ad hoc letter
System Letter Code	Display only	N/A	System letter code to which document is mapped
Delivery Type	Display only	N/A	Method of correspondence delivery
Status	Display only	N/A	Document status. Valid values include: <ul style="list-style-type: none"> ■ Success if letter is sent to student ■ Failure if not sent ■ Delete if item is deleted in Oracle One-to-One Fulfillment. You cannot resend a deleted item to a person. ■ Submitted if request is made for letter to be sent ■ Stalled if request is stalled because of database or other issue
Requested Date	Display only	N/A	Date correspondence is requested
Sent Date	Display only	N/A	Date document is sent

Table 12–3 (Cont.) Correspondence Interaction History Window Description

Field Name	Type	Features	Description
Resend	Display only	Check box	<p>If selected, indicates correspondence letter is marked for resending to student.</p> <p>After you click Resend for a particular requested document, a new record is added for that student with the same information and the Resend check box is selected.</p>
Document Name	Display only	N/A	Name of the document sent to the student
Application Number	Display only	N/A	Student’s application number
Program Code	Display only	N/A	Program code student applied for
Sequence Number	Display only	N/A	Student’s application sequence number
Award Year	Display only	N/A	Program award year
Effective Dates	Display only	N/A	Award year start and end dates
Resend	Optional	Button	Sends the selected letter to student

12.4.1 Resending Correspondence Letters

You can reproduce an exact copy of the correspondence letter sent to a student and resend the letter to the same student.

You can only resend a letter using the same delivery method as the original letter.

Prerequisites

Templates are created in One-to-One Fulfillment.

Collateral and attachments are created in One-to-One Fulfillment via OCM Attachments and OCM E-mail Deliverables.

A letter has been sent.

Navigation

Correspondence > Correspondence Interaction History > Correspondence Interaction History

Steps

1. Query the person.
2. For the letter that you want to resend, select the record in the Interactions tab.
3. Click **Resend**.

12.5 Running Correspondence Concurrent Processes

For information on running a concurrent process, see [Concurrent Process Procedures](#).

12.6 Generic Ad Hoc Letter Concurrent Process

A letter with general information, such as a brochure, newsletter, or prospectus is referred to as an *ad hoc letter*. The Generic Ad Hoc Letter concurrent process will send a letter of general information to a student or recipient list.

The following table describes the Generic Ad Hoc Letter concurrent process parameters.

Table 12–4 Generic Ad Hoc Letter Concurrent Process Parameters

Parameter	Description
Document Name	Document mapped to the Generic Ad Hoc Letter concurrent process
Selection Criteria	Student or list or Person ID Group Note: If Student is selected, administrators must enter the Person Number. If List is selected, administrators must enter the List Name. If Person ID Group is selected, you must enter the person ID group.
List Name	List Name will show all the List SQL Query created in 1-1 Fulfillment and Mapped with List Type Mapping in OSS-Mapping and Attribute form. Selected List SQL Query will execute at the run time and send Correspondence Request letter to each recipient of that list.
Person Number	Person number of the applicant
Override Flag	Yes or No If Yes , administrators can override the number of elapsed days defined in the Mapping and Attributes window.

Table 12–4 Generic Ad Hoc Letter Concurrent Process Parameters

Parameter	Description
Delivery Type	Method of letter delivery You can choose from E-MAIL , E-MAIL/FAX , E-MAIL/FAX/PRINT , E-MAIL/PRINT , FAX , FAX/PRINT .
Printer Name	Name of the printer
Fax Number	Fax number of the applicant
Person ID Group	Select the person ID group.

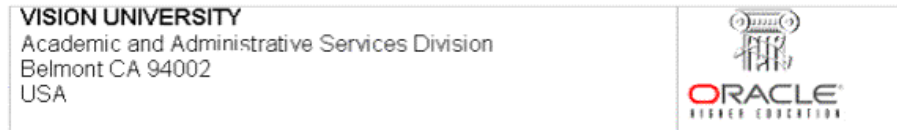
12.7 Generic Ad Hoc Letter - SQL Query

The following SQL query can be used for creating an ad hoc letter.

```
SELECT
    PARTY_NUMBER PERSON_NUMBER,
    IGS_CO_GEN_003.get_per_addr_for_corr(party_id) PERSON_NAME_ADDRESS,
    TO_CHAR(SYSDATE, 'MonthFMDD,RRRR') TODAYS_DATE,
    NVL(salutation,person_pre_name_adjunct) SALUTATION,
    person_first_name GIVEN_NAMES
FROM hz_parties
WHERE party_id = :p_person_id;
```

12.8 Generic Ad Hoc Letter - Sample Output

The following figure shows sample output.

Figure 12–1 Generic Ad Hoc Letter

Ref No: 98005533

Ms. Cyndi Smith
32 Daisy Street
West Me Ton, CA 93204
USA

Dear Ms. Smith,

< Write the body of the letter here. >

If you require further information concerning this letter, contact me, via the details below.

Yours Sincerely,
John Smith
Vision International
Tel: 603 5227 1111

12.9 Admissions Ad Hoc Letter Concurrent Process

An admissions ad hoc letter is sent to the applicant if there is no template that adequately describes the information that you want to convey.

The parameters are similar to the [Generic Ad Hoc Letter Concurrent Process](#) parameters except for Document Name. This is the name of the document mapped to the Admissions Ad Hoc Letter concurrent process.

12.10 Enrollment Ad Hoc Letter Concurrent Process

An enrollment ad hoc letter is sent to the applicant if there is no template that adequately describes the information that you want to convey.

The parameters are similar to the [Generic Ad Hoc Letter Concurrent Process](#) parameters except for Document Name. This is the name of the document mapped to the Enrollment Ad Hoc Letter concurrent process.

12.11 Financial Aid Ad Hoc Letter Concurrent Process

A Financial Aid ad hoc letter is sent to the applicant if there is no template that adequately describes the information that you want to convey.

The parameters are similar to the [Generic Ad Hoc Letter Concurrent Process](#) parameters except for Document Name. This is the name of the document mapped to the Financial Aid Ad Hoc Letter concurrent process.

12.12 Student Finance Ad Hoc Letter Concurrent Process

A student finance ad hoc letter is sent to the applicant if there is no template that adequately describes the information that you want to convey.

The parameters are similar to the [Generic Ad Hoc Letter Concurrent Process](#) parameters except for Document Name. This is the name of the document mapped to the Student Finance Ad Hoc Letter concurrent process.

12.13 Admissions - Acknowledgement Letter Concurrent Process

The educational institution sends an acknowledgement letter to the applicant once an application is received.

For each application, this letter must be sent only once. Therefore, when the concurrent process is run, administrators must check with OSS Interaction History to ensure that this letter is sent only once.

The Admissions - Acknowledgement Letter concurrent process sends an acknowledgement letter to a student or list.

The following table describes the Admissions - Acknowledgement Letter concurrent process parameters.

Table 12–5 Admissions - Acknowledgement Letter Concurrent Process Parameters

Parameter	Description
Document Name	Document mapped to the Admissions - Acknowledgement Letter concurrent process

Table 12–5 (Cont.) Admissions - Acknowledgement Letter Concurrent Process

Parameter	Description
Selection Criteria	Student, List, Parameter, or Person ID Group If Student is selected, administrators must enter Person Number. If List is selected, administrators must enter List Name. If Parameter is selected, administrators must enter the rest of the parameters. If Person ID Group is selected, you must enter the person ID group.
List Name	Recipient list name to which letter is sent. This is created using One-to-One Fulfillment and also mapped to the system letter code in Oracle Student System.
Person Number	Person number of the applicant
Override Flag	Yes or No. If Yes , administrators can override the number of elapsed days defined in the Mapping and Attributes window.
Delivery Type	Method of letter delivery You can choose from E-MAIL, E-MAIL/FAX, E-MAIL/FAX/PRINT, E-MAIL/PRINT, FAX, FAX/PRINT.
Printer Name	Name of the printer
Fax Number	Fax number of the applicant
Person ID Group	Select the person ID group.
Academic Calendar	Send letter to applicants who have applied for a specific academic calendar
Admission Calendar	Send letter to applicants who have applied for a specific admission calendar
Admission Process Category	Send letter to applicants whose application belongs to specific admission process category
Application Date From	Admission application start date
Application Date To	Admission application end date

12.14 Admissions - Acknowledgement Letter - SQL Query

The following SQL query can be used for creating an acknowledgement letter.

```
SELECT DISTINCT todays_date,
               person_number,
               person_name_address,
```

```
NVL(salutation, prefix) salutation,  
given_names,  
preference_number,  
course_cd,  
course_title,  
location_desc,  
attendance_mode_desc,  
attendance_type_desc,  
acad_alternate_code  
FROM   igs_ad_ack_letter_v  
WHERE  person_id = :p_person_id  
AND    adm_appl_number = :p_adm_appl_number  
ORDER BY preference_number
```

12.15 Admissions - Acknowledgement Letter - Sample Output

The following figure shows sample output.

Figure 12-2 Admissions - Acknowledgement Letter

VISION UNIVERSITY Academic and Administrative Services Division 300 Oracle Parkway Belmont CA 94002	
--	---

Ref. No: 98005533

Ms. Cyndi Smith
 32 Daisy Street
 West Melton, CA 93204
 USA

January 15, 2001

Re: Admission Acknowledgment Letter

Dear Ms. Smith,

We have received your application for admission to the following program(s) at Vision University. Please check that the details are correctly recorded. If you need to correct any detail please return this letter with the written corrections to the Admissions Office as soon as possible. All corrections need to be in writing to take effect.

Preference	Program Code	Program Name	Location	Mode	Type	Year
1	2156	BS in Engineering	Belmont	On Campus	Full Time	2001-02

If you wish to change your preferences, please complete the attached "Change of Preference" form by the 26th January 2002.

If you require further information concerning this letter, please contact me, via the details below.

Yours sincerely,
 John Smith
 Vision International.
 Tel.: 03 52 271111

12.16 Admissions - Admissions Letter Concurrent Process

To inform the admission decision to the applicant, the educational institution sends an admission letter.

The following table describes the Admissions - Admissions Letter concurrent process parameters.

Table 12–6 Admissions - Admissions Letter Concurrent Process Parameters

Parameter	Description
Document Name	Document mapped to the Admissions - Admissions Letter concurrent process
Selection Criteria	Student, List, Parameter, or Person ID Group If Student is selected, administrators must enter Person Number. If List is selected, administrators must enter List Name. If Parameter is selected, administrators must enter the rest of the parameters. If Person ID Group is selected, you must enter the person ID group.
List Name	Recipient list name to which letter is sent
Person Number	Person number of the applicant
Override Flag	Yes or No If Yes , administrators can override the number of elapsed days defined in the Mapping and Attributes window.
Person ID Group	Person ID group
Delivery Type	Method of letter delivery You can choose from E-MAIL, E-MAIL/FAX, E-MAIL/FAX/PRINT, E-MAIL/PRINT, FAX, FAX/PRINT.
Printer Name	Name of the printer
Fax Number	Fax number of the applicant
Person ID Group	Person ID group
Academic Calendar	Send letter to applicants who have applied for a specific academic calendar
Admission Calendar	Send letter to applicants who have applied for a specific admission calendar
Admission Process Category	Send letter to applicants whose application belongs to specific admission process category
Application Date From	Admission application start date
Application Date To	Admission application end date
Outcome Status	Application outcome status

12.17 Admissions - Admissions Letter - SQL Query

The following SQL query can be used for creating an admissions letter.

```
SELECT distinct person_number,
               person_name_address,
               NVL(salutation,prefix) salutation,
               given_names,
               todays_date,
               course_title,
               attendance_mode_desc,
               attendance_type_desc,
               location_desc,
               entry_status_name,
               entry_status_desc,
               academic_year_alterdate_code,
               sch_apl_to,
               sch_apl_to_desc,
               special_group1_name,
               special_group1_desc
FROM   igs_ad_outcome_letters_v
WHERE  person_id = :p_person_id
AND    nominated_course_cd = :p_nominated_course_cd
AND    adm_appl_number = :p_adm_appl_number
AND    appl_sequence_number= :p_appl_sequence_number
AND    s_adm_outcome_status = 'OFFER'
AND    previous_term_adm_appl_number IS NULL
AND    previous_term_sequence_number IS NULL
```

12.18 Admissions - Admissions Letter- Sample Output

The following figure shows sample output.

Figure 12-3 Admissions - Admissions Letter



Ref. No: 98005533

Ms. Cyndi Smith
32 Daisy Street
West Melton, CA 93204
USA

January 15, 2001

Dear Ms. Smith,

Congratulations! We are pleased to advise you of the status of your application for admission to Oracle Vision University.

On behalf of the faculty, staff and administration, I am pleased to offer you admission to **Bachelor of Science in Computer Science** Program for **On Campus, Full Time** study at the **Belmont** Campus of Vision University as a **Freshman** for the **2001-2002** Academic Year.

As a student offered **Early Action** admission, you are among a select group of individuals whose strong interest in Tulane combined with your academic and personal qualities have made a significant impression.

You must send a \$150 non-refundable commitment deposit by January 15. If you are interested in reserving a room on campus, please submit an additional \$150.00. Additional materials regarding housing, orientation, and registration will be sent to you throughout the spring. Please note that your acceptance is contingent upon maintaining a high level of academic performance and personal conduct through the completion of your senior year. Failure to do so may result in the rescission of our admission offer.

The Vision experience is demanding and rewarding. It is my pleasure to cordially invite you to become a member of the **School of Math and Science** Class of 2004.

If you require further information concerning this letter, please contact me, via the details below.

Yours sincerely,
John Smith
Vision International
Tel: 03 5227 1111

12.19 Admissions - Admit to Future Term Letter Concurrent Process

At times when there are no available seats or when the educational institution does not want to admit the applicant for the current term, the applicant is given an offer of admission to a future term.

This offer letter must be sent only when the outcome status of an application is **Offer Future Term**. It must be sent only once for each application. Therefore, when the concurrent process is run, you must check with OSS Interaction History to ensure that this letter is sent only once.

The Admissions - Admit to Future Term Letter concurrent process sends a request to CRM to send a letter to an applicant or recipient list.

All parameters are similar to the [Admissions - Admissions Letter Concurrent Process](#) parameters.

12.20 Admissions - Admit to Future Term Letter - SQL Query

The following SQL query can be used for creating the future term letter.

```
SELECT DISTINCT      PERSON_NUMBER,
                     PERSON_NAME_ADDRESS,
                     NVL(salutation,prefix) SALUTATION,
                     GIVEN_NAMES,
                     TODAYS_DATE,
                     COURSE_TITLE,
                     ATTENDANCE_MODE_DESC,
                     ATTENDANCE_TYPE_DESC,
                     LOCATION_DESC,
                     entry_status_name,
                     ENTRY_STATUS_DESC,
                     FUTURE_ACAD_ALTERNATE_CODE,
                     sch_apl_to SCH_APL_TO,
                     sch_apl_to_desc
FROM                 igs_ad_outcome_letters_v
WHERE                s_adm_outcome_status = 'OFFER-FUTURE-TERM'
AND                  person_id           = :p_person_id
AND                  adm_appl_number      = :p_adm_appl_number
AND                  appl_sequence_number = :p_appl_sequence_number
AND                  nominated_course_cd  = :p_nominated_course_cd
```

12.21 Admissions - Admit to Future Term Letter - Sample Output

The following figure shows sample output.

Figure 12-4 Admissions - Admit to Future Term Letter

<p>VISION UNIVERSITY Academic and Administrative Services Division 300 Oracle Parkway Belmont CA 94002</p>	
--	---

Ref. No: 98005533

Ms. Cyndi Smith
32 Daisy Street
West Melton, CA 93204
USA

January 15, 2001

Dear Ms. Smith,

We are pleased to advise you of the status of your application for admission to Oracle Vision University. We recently received your request for admission to a future term, and are pleased to offer you admission to the term you requested.

On behalf of the faculty, staff and administration, I am pleased to offer you admission to **Bachelor of Science in Computer Science** Program for **On Campus, Full Time** study at the **Belmont** Campus of Vision University as a **Freshman** for the **2002-2003** Academic Year.

Your \$150 non-refundable commitment deposit, due by January 15, 2001, will hold your place in the entering class for **2002-2003**. Additional materials regarding housing, orientation, and registration will be sent to you throughout the spring. Please note that your acceptance is contingent upon maintaining a high level of academic performance and personal conduct through the completion of your senior year. Failure to do so may result in the rescission of our admission offer.

The Vision experience is demanding and rewarding. It is my pleasure to cordially invite you to become a member of the **School of Math and Science 2002-2003** entering class.

If you require further information concerning this letter, please contact me, via the details below.

Yours sincerely,
John Smith
Vision International
Tel: 03 5227 1111

12.22 Admissions - Conditional Offer Letter Concurrent Process

Applicants are offered admission, if they fulfill all requirements of the application process. In certain situations, an applicant is given a conditional offer where the acceptance of the offer is subject to fulfillment of requirements.

This letter must be sent only when the outcome status of an application is **Conditional Offer**. It must be sent only once for each application. Therefore, when the concurrent process is run, administrators must check with OSS Interaction History to ensure that this letter is sent only once.

The Admissions - Conditional Offer Letter concurrent process sends a request to CRM to send a conditional offer letter to an applicant or recipient list.

All parameters are similar to the [Admissions - Admissions Letter Concurrent Process](#) parameters.

12.23 Admissions - Conditional Offer Letter - SQL Query

The following SQL query can be used for creating the conditional offer letter.

```
SELECT distinct person_number,
               person_name_address,
               NVL(salutation,prefix) salutation,
               given_names,
               todays_date,
               course_title,
               attendance_mode_desc,
               attendance_type_desc,
               location_desc,
               entry_status_name,
               entry_status_desc,
               academic_year_alternate_code,
               cndtnl_offer_cndtn,
               sch_apl_to,
               sch_apl_to_desc
FROM   igs_ad_outcome_letters_v
WHERE  person_id = :p_person_id
AND    nominated_course_cd = :p_nominated_course_cd
AND    adm_appl_number = :p_adm_appl_number
AND    appl_sequence_number= :p_appl_sequence_number
AND    s_adm_outcome_status = 'COND-OFFER'
```

12.24 Admissions - Conditional Offer Letter - Sample Output

The following figure shows sample output.

Figure 12-5 Admissions - Conditional Offer Letter

<p>VISION UNIVERSITY Academic and Administrative Services Division 300 Oracle Parkway Belmont CA 94002</p>	
--	---

Ref. No: 98005533

Ms. Cyndi Smith
32 Daisy Street
West Melton, CA 93204
USA

January 15, 2001

Dear Ms. Smith,

Congratulations! We are pleased to advise you of the status of your application for admission to Oracle Vision University.

On behalf of the faculty, staff and administration, I am pleased to offer you admission to **Bachelor of Science in Computer Science** Program for **On Campus, Full Time** study at the **Belmont** Campus of Vision University as a **Freshman** for the **2001-2002** Academic Year.

Please note that your acceptance to Vision University is contingent upon **successful completion of your Calculus class**. In addition, you must maintain a high level of academic performance and personal conduct through the completion of your senior year. Failure to do so may result in the rescission of our admission offer.

You must send a \$150 non-refundable commitment deposit by January 15. If you are interested in reserving a room on campus, please submit an additional \$150.00. Additional materials regarding housing, orientation, and registration will be sent to you throughout the spring.

The Vision experience is demanding and rewarding. It is my pleasure to cordially invite you to become a member of the **School of Math and Science** Class of 2004.

If you require further information concerning this letter, please contact me, via the details below.

Yours sincerely,
John Smith
Vision International
Tel: 03 5227 1111

12.25 Admissions - Future Term Second Admission Letter Concurrent Process

A future term second admission letter is sent to an applicant who has already been advised of admission to a future term.

This letter is sent only when the outcome status of an application is **Offer**. It must be sent only once for each application. Hence, when the concurrent process is run, administrators must check with OSS Interaction History to ensure that this letter is sent only once. This letter must only be sent for an application that is created as a result of a previous Offer Future Term outcome.

The Admissions - Future Term Second Admission Letter concurrent process sends a request to CRM to send a letter to an applicant or recipient list.

All parameters are similar to the [Admissions - Admissions Letter Concurrent Process](#) parameters.

12.26 Admissions - Future Term Second Admission Letter - SQL Query

The following SQL query can be used for creating the future term second admission letter.

```
SELECT DISTINCT  PERSON_NUMBER,
                  person_name_address,
                  NVL(salutation,prefix) salutation,
                  given_names,
                  todays_date,
                  course_title,
                  attendance_mode_desc,
                  attendance_type_desc,
                  location_desc,
                  entry_status_name,
                  entry_status_desc,
                  academic_year_alternate_code,
                  sch_apl_to,
                  sch_apl_to_desc
FROM      igs_ad_outcome_letters_v
WHERE     s_adm_outcome_status = 'OFFER'
AND       previous_term_adm_appl_number IS NOT NULL
AND       previous_term_sequence_number IS NOT NULL
AND       person_id                    = :p_person_id
AND       adm_appl_number              = :p_adm_appl_number
AND       appl_sequence_number        = :p_appl_sequence_number
```

AND nominated_course_cd = :p_nominated_course_cd

12.27 Admissions - Future Term Second Admission Letter - Sample Output

The following figure shows sample output.

Figure 12-6 Admissions - Future Term Second Admission Letter

VISION UNIVERSITY Academic and Administrative Services Division 300 Oracle Parkway Belmont CA 94002	
--	--

Ref. No: 98005533

Ms. Cyndi Smith
32 Daisy Street
West Melton, CA. 93204
USA

January 15, 2001

Dear Ms. Smith,

Congratulations! We are pleased to once again advise you of the status of your application for admission to Oracle Vision University.

On behalf of the faculty, staff and administration, we are pleased to confirm your admission to the **Bachelor of Science in Computer Science** Program for **On Campus, Full Time** study at the **Belmont** Campus of Vision University as a Freshman for the **2001-2002** Academic Year.

As a reminder, if you are interested in reserving a room on campus, please submit a \$150.00 housing deposit. Additional materials regarding housing, orientation, and registration will be sent to you throughout the spring.

The Vision experience is demanding and rewarding. It is my pleasure to cordially welcome you as a member of the **School of Math and Science** Class of 2004.

If you require further information concerning this letter, please contact me, via the details below.

Yours sincerely,
John Smith
Vision International
Tel: 03 5227 1111

12.28 Admissions - Missing Items Letter Concurrent Process

An applicant has to fulfil certain requirements for the application to be processed. These requirements are set as Mandatory in the Admission Process Category Detail window. The items can be transcripts, credentials, or personal statements which the applicant has to enclose along with the application. A missing items letter is sent to the applicant if any of these requirements are not fulfilled and the Application Completion Status is **Incomplete** in the View Requirements window.

The Admissions - Missing Items Letter concurrent process sends a request to CRM to send a letter to an applicant or recipient list.

All parameters are similar to the [Admissions - Acknowledgement Letter Concurrent Process](#) with some exceptions.

The following table describes the rest of the Admissions - Missing Items Letter concurrent process parameters.

Table 12-7 Admissions - Missing Items Letter Concurrent Process Parameters

Parameter	Description
Application Completion Status	Status of application completion
Organization Unit Code	Responsible organization unit code
Application	Application instance

12.29 Admissions - Missing Items Letter - SQL Query

The following SQL query can be used for creating the missing items letter.

```
SELECT DISTINCT
PERSON_NUMBER,
TODAYS_DATE,
PERSON_NAME_ADDRESS,
SALUTATION,
GIVEN_NAMES,
COURSE_TITLE,
ATTENDENCE_MODE_DESC,
ATTENDENCE_TYPE_DESC,
LOCATION_DESC,
STEP_DESCRIPTION,
STEP_DUE_DATE
FROM igs_ad_missing_items_letter_v
WHERE person_id = :p_person_id AND
```

```
adm_appl_number = :p_adm_appl_number AND
appl_sequence_number= :p_appl_sequence_number AND
nominated_course_cd = :p_nominated_course_cd
```

12.30 Admissions - Missing Items Letter - Sample Output

The following figure shows sample output.

Figure 12–7 Admissions - Missing Items Letter

VISION UNIVERSITY
Academic and Administrative Services Division
300 Oracle Parkway
Belmont CA 94002



Ref. No: 98005533

Ms. Cyndi Smith
32 Daisy Street
West Melton, CA 93204
USA

January 15, 2001

RE: Missing Items Letter

Dear Ms Smith,

Thank you for your application for admission to Oracle Vision University. Your application documentation is currently incomplete.

Your application for **Bachelor of Arts in Fine Arts** for **On Campus, Full Time** study at the **Belmont** Campus requires the following documents be submitted by the listed due date.

Please submit these items directly to the Admissions Office.

Item Required	Item Submission Due Date
Admission Processing	14-Nov-2001 00:00:00
sca dm1	04-Nov-2001 00:00:00

If you have feel this evaluation is incorrect or if you have additional information to provide, you may contact the Admissions office at (123) 555 6333.

Yours sincerely,

Josie Jones
Admissions Officer

12.31 Admissions - No-Quota Letter Concurrent Process

The educational institution sends a No-Quota letter to the applicant when the seats are full and no more offers can be made.

This letter is sent only when the outcome status of an application is **No-Quota**. It must be sent only once for each application. Therefore, when the concurrent process is run, administrators must check with Oracle Student System Interaction History to ensure that this letter is sent only once.

The Admissions - No-Quota Letter concurrent process sends a request to CRM to send a letter to an applicant or recipient list.

All parameters are similar to the [Admissions - Admissions Letter Concurrent Process](#) parameters.

12.32 Admissions - No-Quota Letter - SQL Query

The following SQL query can be used for creating the no-quota letter.

```
SELECT DISTINCT person_number,
               person_name_address,
               todays_date,
               NVL(salutation,prefix) salutation,
               given_names,
               course_title,
               attendance_mode_desc,
               attendance_type_desc,
               location_desc,
               entry_status_desc,
               academic_year_alternate_code,
               entry_status_name
FROM   igs_ad_outcome_letters_v
WHERE  person_id = :p_person_id
AND    adm_appl_number = :p_adm_appl_number
AND    appl_sequence_number= :p_appl_sequence_number
AND    nominated_course_cd = :p_nominated_course_cd
AND    s_adm_outcome_status = 'NO-QUOTA'
```

12.33 Admissions - No-Quota Letter - Sample Output

The following figure shows sample output.

Figure 12-8 Admissions - No-Quota Letter

<p>VISION UNIVERSITY Academic and Administrative Services Division 300 Oracle Parkway Belmont CA 94002</p>	
<p>Ref. No: 98005533</p> <p>Ms. Cyndi Smith 32 Daisy Street West Melton, CA 93204 USA</p> <p>January 15, 2001</p> <p>Dear Ms. Smith,</p> <p>The purpose of this letter is to advise you of the status of your application for admission to Vision University. First, on behalf of the Admission staff of Vision University, thank you for the effort you invested in your application. We reviewed your application and essays with great interest.</p> <p>While your academic and extracurricular accomplishments to date are impressive, we are unable to offer you admission for the Bachelor of Science in Computer Science Program for On Campus, Full Time study at the Belmont Campus of Vision University as a Freshman for the 2001-2002 Academic Year</p> <p>While we were unable to offer you admission for this admission period, please know that we were impressed by your academic and extracurricular accomplishments to date. If you are willing to begin your studies later, please consider Vision University for future admission periods.</p> <p>If you require further information concerning this letter, please contact me, via the details below.</p> <p>Yours sincerely, John Smith Vision International Tel: 03 5227 1111</p>	

12.34 Admissions - Post Admission Missing Items Letter Concurrent Process

Once an admission offer is made, an applicant must satisfy certain post-admission requirements. The educational institution sends a post admission missing items letter when the tracking items associated with an application with the system tracking type of **Post Admission Requirements** are incomplete.

The Admissions - Post Admission Missing Items Letter concurrent process sends a request to CRM to send a letter to an applicant or recipient list.

All parameters are similar to the [Admissions - Acknowledgement Letter Concurrent Process](#) parameters, with some exceptions.

The following table describes the rest of the Admissions - Post Admission Missing Items Letter concurrent process parameters.

Table 12–8 Admissions - Post Admission Missing Items Letter Concurrent Process Parameters

Parameter	Description
Application Completion Status	Status of the application
Organization Unit Code	Responsible organization unit code
Application	Application instance

12.35 Admissions - Post Admission Missing Items Letter - SQL Query

The following SQL query can be used for creating the post admission missing items letter.

```
SELECT DISTINCT todays_date,
               person_number,
               person_name_address
               NVL(salutation, prefix) salutation,
               given_names,
               course_title,
               attendance_mode_desc,
               attendance_type_desc,
               step_description,
               step_due_date
FROM   igs_ad_postadm_miss_itm_ltr_v
WHERE  person_id = :p_person_id
AND    adm_appl_number = :p_adm_appl_number
AND    nominated_course_cd = :p_nominated_course_cd
AND    appl_sequence_number = :p_appl_sequence_number
ORDER BY TO_DATE(step_due_date, 'DD-Mon-YYYY')
```

12.36 Admissions - Post Admission Missing Items Letter - Sample Output

The following figure shows sample output.

Figure 12–9 Admissions - Post Admission Missing Items Letter

Ref. No: 98005533

Ms. Cyndi Smith
32 Daisy Street
West Melton, CA 93204
USA

January 15, 2001

RE: Post Admission Missing Items Letter

Dear Ms Smith,

Thank you for your application for admission to Oracle Vision University. Your application documentation is currently incomplete.

Congratulations again on your admission to Vision University, in the **Bachelor of Arts** program for **On Campus, Full Time** study. Prior to the enrollment process, there are additional requirements you must complete so we can prepare for your arrival. Please submit the following documents by the listed due date.

Course Requirements	Course Requirements Final Date	Program of Study	Item Required	Item Submission Due Date
Testing Assign Requirement	14-Nov-2001 00:00:00	Master of Arts in History	Admission Processing	14-Nov-2001 00:00:00
Testing Assign Requirement	14-Nov-2001 00:00:00	Master of Arts in History	<u>scadml</u>	04-Nov-2001 00:00:00

Each item should be submitted to the appropriate university office, as outlined in the attached university office list.

If you have feel this evaluation is incorrect or if you have additional information to provide, you may contact the Admissions office at (123) 555 6333. You may also contact the relevant university office directly; please be sure to indicate that you are a new student. We're eager to provide any assistance you may need over the coming weeks.

Yours sincerely,

Josie Jones
Admissions Officer
Vision International
Tel: 03 5227 1111

12.37 Admissions - Rejection Letter Concurrent Process

The educational institution sends a rejection letter to the applicant when an the application is rejected.

This letter is sent only when the outcome status of an application is **Rejected**. It must be sent only once for each application. Therefore, when the concurrent process is run, administrators must check with Oracle Student System Interaction History to ensure that this letter is sent only once.

The Admissions - Rejection Letter concurrent process sends a request to CRM to send a letter to an applicant or recipient list.

All parameters are similar to the [Admissions - Admissions Letter Concurrent Process](#) parameters.

12.38 Admissions - Rejection Letter - SQL Query

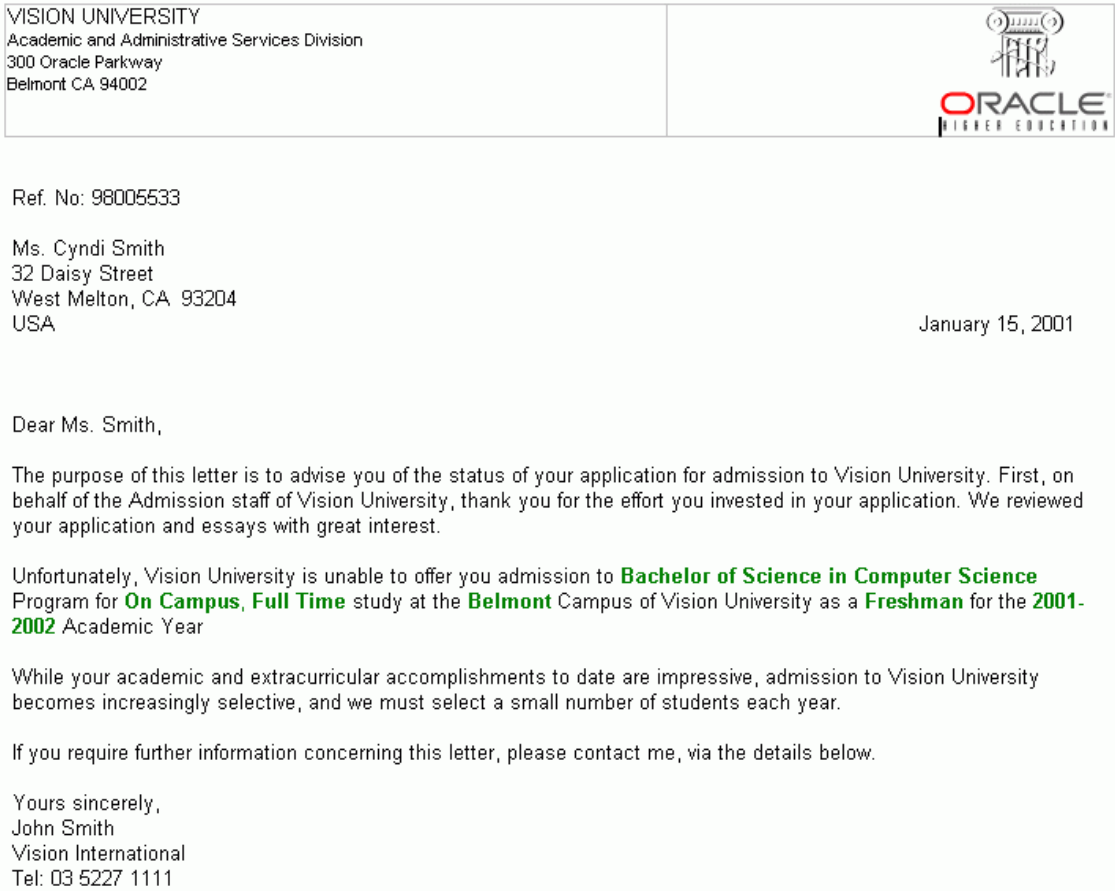
The following SQL query can be used for creating the rejection letter.

```
SELECT distinct person_number,
               person_name_address,
               NVL(salutation,prefix) salutation,
               given_names,
               todays_date,
               course_title,
               attendance_mode_desc,
               attendance_type_desc,
               location_desc,
               entry_status_name,
               entry_status_desc,
               academic_year_alternate_code
FROM igs_ad_outcome_letters_v
WHERE person_id = :p_person_id
AND   nominated_course_cd = :p_nominated_course_cd
AND   adm_appl_number = :p_adm_appl_number
AND   appl_sequence_number= :p_appl_sequence_number
AND   s_adm_outcome_status = 'REJECTED'
```

12.39 Admissions - Rejection Letter - Sample Output

Admissions - Rejection Letter

Figure 12-10 Admission - Rejection Letter



12.40 Admissions - Residency Letter Concurrent Process

- The educational institution sends a letter to the applicant informing about the institution’s assessment of the applicant’s residency status.
- The Admissions - Residency Letter concurrent process sends a request to CRM to send a letter to an applicant or recipient list.
- The following table describes the Admissions - Residency Letter concurrent process parameters.

Table 12–9 Admissions Residency Letter Concurrent Process Parameters

Parameter	Description
Document Name	Document mapped to the Admissions - Residency Letter concurrent process
Selection Criteria	Student, List, Parameter, or Person ID Group If Student is selected, administrators must enter Person Number. If List is selected, administrators must enter List Name. If Parameter is selected, administrators must enter the rest of the parameters. If Person ID Group is selected, you must enter the person ID group.
List Name	Recipient list name to which letter is sent
Person Number	Person number of the applicant
Override Flag	Yes or No If Yes , administrators can override the number of elapsed days defined in the Mapping and Attributes window.
Delivery Type	Method of letter delivery You can choose from E-MAIL, E-MAIL/FAX, E-MAIL/FAX/PRINT, E-MAIL/PRINT, FAX, FAX/PRINT.
Printer Name	Name of the printer
Fax Number	Fax number of the applicant
Person ID Group	Person ID group to which the applicant belongs
Residency Status	Applicant's residency status. For example, in state, out of state, and migration
Residency Class	Applicant's residency class. For example, county, district, and state
Evaluation Date From	Applicant's residency evaluation start date
Evaluation Date To	Applicant's residency evaluation end date

12.41 Admissions - Residency Letter - SQL Query

The following SQL query can be used for creating the residency letter.

```
SELECT DISTINCT
PERSON_NUMBER,
TODAYS_DATE,
PERSON_NAME_ADDRESS,
```

```
SALUTATION,  
GIVEN_NAMES,  
ACADEMIC_YEAR,  
RESIDENCY_STATUS,  
RESIDENCY_DFF_VALUES  
FROM  
IGS_AD_RESI_LETTER_V  
where PERSON_ID = :p_person_id
```

12.42 Admissions - Residency Letter - Sample Output

The following figure shows sample output.

Figure 12-11 Admissions - Residency Letter

<p>VISION UNIVERSITY Academic and Administrative Services Division 300 Oracle Parkway Belmont CA 94002</p>	
--	---

Ref. No: 98005533

Ms. Cyndi Smith
32 Daisy Street
West Melton, CA 93204
USA

January 15, 2001

RE: Residency Letter

Dear Ms Smith,

Congratulations on your acceptance to Oracle University for **Fall 2001**. Thank you for submitting your documentation for review by our Residency Evaluation Committee.

We have evaluated your residency status and determined that your residency status is **IN STATE**.

The following information was used in the assessment of your Residency Status:

Date of arrival in California: 01-JAN-1998
State in which you most recently filed state income tax: California
Voter registration in states other than California: No

If you have feel this evaluation is incorrect or if you have additional information to provide, you may contact the Admissions office at (123) 555 6333.

Yours sincerely,

Josie Jones
Admissions Officer

12.43 Admissions - Waitlist Letter Concurrent Process

An applicant is placed on a waitlist when the seats are full. This applicant stands the chance of an offer if any of the selected applicants rejects the admission offer.

The Admissions - Waitlist Letter concurrent process produces a report on basic information about programs to check details on an annual basis.

This letter is sent only when the outcome status of an application is Waitlist. It must be sent only once for an application instance. Hence, when the concurrent process is run, administrators must check with Oracle Student System Interaction History to ensure that this letter is sent only once.

The Admissions - Waitlist Letter concurrent process sends a request to CRM to send a letter to an applicant or recipient list.

All parameters are similar to the [Admissions - Admissions Letter Concurrent Process](#) parameters.

12.44 Admissions - Waitlist Letter - SQL Query


The following SQL query can be used for creating the waitlist letter.

```
SELECT DISTINCT person_number,
                person_name_address,
                NVL(salutation,prefix) salutation,
                given_names,
                todays_date,
                course_title,
                attendance_mode_desc,
                attendance_type_desc,
                location_desc,
                entry_status_name,
                entry_status_desc,
                academic_year_alternate_code,
                waitlist_rank
FROM igs_ad_outcome_letters_v
WHERE person_id = :p_person_id
AND adm_appl_number = :p_adm_appl_number
AND appl_sequence_number= :p_appl_sequence_number
AND nominated_course_cd = :p_nominated_course_cd
AND s_adm_outcome_status = 'WAITLIST'
```

12.45 Admissions - Waitlist Letter - Sample Output

The following figure shows sample output.

Figure 12-12 Admissions - Waitlist Letter

<p>VISION UNIVERSITY Academic and Administrative Services Division 300 Oracle Parkway Belmont CA 94002</p>	
<p>Ref. No: 98005533</p> <p>Ms. Cyndi Smith 32 Daisy Street West Melton, CA 93204 USA</p> <p style="text-align: right;">January 15, 2001</p> <p>Dear Ms. Smith,</p> <p>The purpose of this letter is to advise you of the status of your application for admission to Vision University. First, on behalf of the Admission staff of Vision University, thank you for the effort you invested in your application. We reviewed your application and essays with great interest.</p> <p>We are greatly interested in offering you admission to Vision University. While your academic and extracurricular accomplishments to date are impressive, we are unable to make a space in the class available to you at this time.</p> <p>To this end, we are pleased to offer you a place on the waitlist for the Bachelor of Science in Computer Science Program for On Campus, Full Time study at the Belmont Campus of Vision University as a Freshman for the 2001-2002 Academic Year. You currently have a waitlist rank of Tier One in the current group of applicants eligible for waitlist status. If you wish to accept a place on the list, please contact us on or before December 1.</p> <p>If you require further information concerning this letter, please contact me, via the details below.</p> <p>Yours sincerely, John Smith Vision International Tel: 03 5227 1111</p>	

12.46 Admissions - Interview Details Letter Concurrent Process

An interview details letter is sent to applicants who have been shortlisted for interview.

The following table describes the Admissions - Interview Details Letter concurrent process parameters.

Table 12–10 Admissions - Interview Details Letter Concurrent Process Parameters

Parameter	Description
Document Name	Document mapped to the Admissions - Interview Details Letter concurrent process
Selection Criteria	<p>Student, List, Parameter, or Person ID Group</p> <p>If Student is selected, administrators must enter Person Number. If List is selected, administrators must enter List Name. If Parameter is selected, administrators must enter the rest of the parameters. If Person ID Group is selected, you must enter the person ID group</p> <p>Applications with interview details recorded are chosen for the letter.</p> <p>Records with Final Interview Decision mapped to a system Final Interview Status of Pending are selected.</p> <p>If screening is part of the interview process, records with a Final Screening Decision mapped to the system Final Screening Status of Interview are selected.</p>
List Name	Recipient list name to which letter is sent
Person Number	Person number of the applicant
Override Flag	<p>Yes or No</p> <p>If Yes, administrators can override the number of elapsed days defined in the Mapping and Attributes window.</p>
Delivery Type	<p>Method of letter delivery</p> <p>You can choose from E-MAIL, E-MAIL/FAX, E-MAIL/FAX/PRINT, E-MAIL/PRINT, FAX, FAX/PRINT.</p>
Printer Name	Name of the printer
Fax Number	Fax number of the applicant
Person ID Group	Person ID group to which the applicant belongs
Academic Calendar	Send letter to applicants who have applied for a specific academic calendar
Admission Calendar	Send letter to applicants who have applied for a specific admission calendar
Admission Process Category	Send letter to applicants whose application belongs to specific admission process category
Interview Panel	Select the name of the interview panel.

Table 12–10 (Cont.) Admissions - Interview Details Letter Concurrent Process

Parameter	Description
Interview Date	Date of interview
Reply Days	Number of days before which reply is expected
Attendance Mode	Program attendance mode. You can choose from Distance Learning , Off Campus , On Campus , and Web based study .
Attendance Type	Type of attendance to the program You can choose from Full time , Half time , Less than half time , and Three quarter time .

12.47 Admissions - Interview Details Letter SQL Query

The following SQL query can be used for creating the Interview Details letter:

```

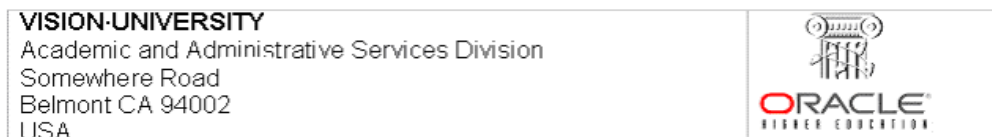
SELECT
('VISION UNIVERSITY' || CHR(10) || 'Academic and Administrative Services
Division' || CHR(10) || '100 Oracle Parkway-815' || CHR(10) || 'Belmont CA 94002')
heading_address,
TODAYS_DATE,
PERSON_ID,
COURSE_OU_DESCRIPTION ADMISSION_PROGRAM_CODE,
COURSE_TITLE PROGRAM_TITLE,
PERSON_NAME_ADDRESS,
NVL(salutation,prefix) SALUTATION,
GIVEN_NAMES,
MEMBER_PERSON_NUMBER ,
MEMBER_FULL_NAME,
INTERVIEW_DATE,
INTERVIEW_TIME,
INTW_LOCATION_DESC,
ROOM_DESC,
PERSON_NAME_ADDRESS,
('John Smith' || CHR(10) || 'Vision
International' || CHR(10) || 'Tel.- 03 52 271111') footer_address
FROM apps.IGS_AD_INTERVIEW_LETTERS_V
WHERE person_id = :p_person_id
AND nominated_course_cd = :p_nominated_course_cd
AND adm_appl_number = :p_adm_appl_number
AND appl_sequence_number= :p_appl_sequence_number
AND panel_code = :p_panel_code

```

12.48 Admissions - Interview Details Letter Sample Output

The following figure shows sample output:

Figure 12-13 Admissions - Interview Details Letter Sample Output



<< LETTER DATE >>

Ref: << PERSON ID / ADMISSIONS PROGRAM CODE >>

«PERSON NAME ADDRESS»

Re: Invitation to attend for admission interview.

Dear «SALUTATION» «GIVEN NAMES»,

Course: << PROGRAM TITLE >>

Further to your application for the above course, I am pleased to invite you to attend an admission interview on << DATE>> at << TIME >> with << INTERVIEWER >>.

You are asked to report to << ROOM>>, << BUILDING>>, << LOCATION>>. Further details and a location map are enclosed.

I would be grateful if you could confirm whether or not you are able to attend the interview by << REPLY DATE >> at the latest.

If you have any queries regarding your interview or application please do not hesitate to contact me at the address given below.

Yours sincerely,

12.49 Admissions - Admit No Response System Letter Concurrent Process

The Admissions - Admit No Response System Letter is sent to applicants who have failed to respond to an admission offer within the given response deadline.

The following table describes the Admissions - Admit No Response System Letter concurrent process parameters.

Table 12–11 Admissions - Admit No Response Letter Concurrent Process Parameters

Parameter	Description
Document Name	Document mapped to the Admissions - Interview Details Letter concurrent process
Selection Criteria	<p>Student, List, Parameter, or Person ID Group</p> <p>If Student is selected, administrators must enter Person Number. If List is selected, administrators must enter List Name. If Parameter is selected, administrators must enter the rest of the parameters. If Person ID Group is selected, you must enter the person ID group.</p> <p>Application instance must have an outcome of Offer or Conditional Offer, and an Offer Response Deadline set.</p>
List Name	Recipient list name to which letter is sent
Person Number	Person number of the applicant
Override Flag	<p>Yes or No</p> <p>If Yes, administrators can override the number of elapsed days defined in the Mapping and Attributes window.</p>
Delivery Type	<p>Method of letter delivery</p> <p>You can choose from E-MAIL, E-MAIL/FAX, E-MAIL/FAX/PRINT, E-MAIL/PRINT, FAX, FAX/PRINT.</p>
Printer Name	Name of the printer
Fax Number	Fax number of the applicant
Person ID Group	Person ID group to which the applicant belongs
Academic Calendar	Send letter to applicants who have applied for a specific academic calendar
Admission Calendar	Send letter to applicants who have applied for a specific admission calendar

Table 12–11 (Cont.) Admissions - Admit No Response Letter Concurrent Process Parameters

Parameter	Description
Admission Process Category	Send letter to applicants whose application belongs to specific admission process category
Program Code	Program for which admission is offered
Department	Department to which the program belongs
Reply Days	Number of days before which reply is expected
Attendance Mode	Program attendance mode. You can choose from Distance Learning , Off Campus , On Campus , and Web based study .
Attendance Type	Type of attendance to the program You can choose from Full time , Half time , Less than half time , and Three quarter time .

12.50 Admissions - Admit No Response System Letter SQL Query

The following SQL query can be used for creating the Admit No Response System Letter:

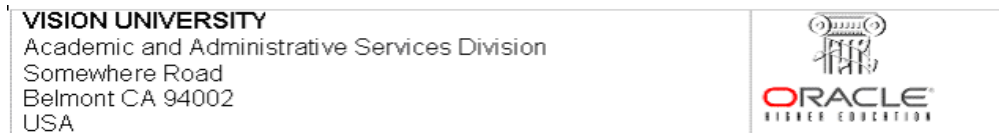
```
SELECT party_name,
('VISION UNIVERSITY' || CHR(10) || 'Academic and Administrative Services
Division' || CHR(10) || '300 Oracle Partway' || CHR(10) || 'Belmont CA 94002') heading_
address,
TODAYS_DATE,
PERSON_ID,
PERSON_NAME_ADDRESS,
NVL(salutation,prefix) SALUTATION,
GIVEN_NAMES,
COURSE_TITLE,
offer_response_dt,
('John Smith' || CHR(10) || 'Vision
International' || CHR(10) || 'Tel.- 03 52 271111') footer_address
FROM apps.IGS_AD_OUTCOME_LETTERS_V
WHERE Admission_outcome_status in ('OFFER','COND-OFFER')
AND s_adm_offer_resp_status = 'PENDING'
AND sysdate > offer_response_dt
and person_id = :p_person_id
AND nominated_course_cd = :p_nominated_course_cd
AND adm_appl_number = :p_adm_appl_number
```

AND appl_sequence_number= :p_appl_sequence_number

12.51 Admissions - Admit No Response System Letter Sample Output

The following figure shows sample output:

Figure 12–14 Admissions - Admit No Response System Letter



<< **LETTER DATE** >>

Ref << **PERSON ID / ADMISSIONS PROGRAM CODE** >>

«PERSON NAME ADDRESS»

Re: Offer Reply Request

Dear «SALUTATION» «GIVEN NAMES»,

Course: << **PROGRAMME TITLE** >>

Further to our offer of a place on the above course, according to our records we have not yet received your response to our offer.

I would be grateful if you could ensure that you confirm whether or not you will be accepting our offer by << **REPLY DATE** >> at the latest.

Please note that if we do receive your reply by the above date then unfortunately your offer of place will lapse and we will assume that you do not wish to join the course.

If you have already replied to our offer I would be grateful if you could contact the Admissions Office as soon as possible to confirm the status of your reply.

If you have any queries regarding your application please do not hesitate to contact me at the address given below.

Yours sincerely,

«FOOTER_ADDRESS»

12.52 Financial Aid - Award Notification Letter

The Financial Aid - Award Notification Letter concurrent process generates an award notification letter or letters for a particular student or list of students. The list of students must be created in Oracle CRM.

The following table describes the Award Notification Letter concurrent process parameters.

Table 12–12 Financial Aid - Award Notification Letter Parameters

Parameter	Description
Document Name	Letter Name
Selection Criteria	Student or Person ID Group If Student is selected, administrators must enter Person Number. If Person ID Group is selected, you must enter the person ID group.
Person ID Group	Dynamic person ID group: Static and dynamic
Person Number	Person number of the applicant
Automatic Term Selection	Automatic Term Selection, select Yes or No
Delivery Type	Method of letter delivery You can choose from E-MAIL, E-MAIL/FAX, E-MAIL/FAX/PRINT, E-MAIL/PRINT, FAX, FAX/PRINT.
Printer Name	Name of the printer.
Fax Number	Fax number of the applicant.
Load Calendar 1	Load Calendar 1
Load Calendar 2	Load Calendar 2
Load Calendar 3	Load Calendar 3
Load Calendar 4	Load Calendar 4
Load Calendar 5	Load Calendar 5
Load Calendar 6	Load Calendar 6

12.53 Financial Aid - Award Notification Letter - SQL Query

The following SQL query can be used for creating the award notification letter.

select


```
person_name_address,  
email_address,  
todays_date,  
person_number,  
letter_id,  
award_year,  
person_ssn,  
salutation,  
given_names,  
award_name,  
award_total term_amount_text,  
award_description,  
award_message,  
institution_name,  
residency_state,  
coa,  
efc_im,  
efc_fm,  
need_im,  
need_fm,  
remain_im,  
remain_fm  
from apps.igf_aw_awd_ltr_v  
where person_id = :p_person_id  
and ci_cal_type = :p_awd_cal_type  
and ci_sequence_number = :p_awd_seq_number
```

12.54 Financial Aid - Award Notification Letter - Sample Output

The following figure shows sample output.

Figure 12-15 Financial Aid - Award Notification Letter

VISION UNIVERSITY Financial Aid Office Belmont CA 94002 USA	
---	--

Hillay Brown
 Va 20784
 United States
 john.mcklien@oracle.com

Student ID: FA TEST
 Student SSN: 142589564

RE: Award Notification Letter

Dear Hillay,

You have been awarded the following financial aid:

Award Type	LOAD SU 04	LOAD FA 04	LOAD SP 04	Award Total
Federal Direct PLUS Loan	0	370	201	571
Term Total	2000	2855	2726	7581

Please review award information.

Award Type	Award Message
Federal Direct PLUS Loan	This is a loan and must be repaid.
Vision Grant	This is a grant and does not have to be repaid.
NIMBY Grant	This is a grant and does not have to be repaid.

Please verify the following information.

College: **Notre Dame University**
 State of permanent residency: **CALIFORNIA**
 Cost of Attendance: **24**
 Need using IM: **24**
 Need using FM: **0**
 Remaining need-using IM: **0**
 Remaining need-using FM: **7010**

Information contained in this letter is current as of the above date and its accuracy supercedes that of any previous notices of this type. If you feel the above information is in error or if you have additional information to provide, you may contact the Financial Aid office at (898) 356 7891.

Important: Please sign on the line below after you have reviewed the above information and then return the letter to the Financial Aid Office.

(Reviewed and found details to be correct)

 (Hillay)
 Yours sincerely,
 Financial Aid Administrator

December 22,2003

Award Year: 2003-2004 federal aid year
 Notice ID: AWW14258956412/22/2003

12.55 Financial Aid - Loan Disbursement Letter

The following table describes Loan Disbursement Letter concurrent process parameters.

Table 12–13 Financial Aid - Loan Disbursement Letter Parameters

Parameter	Description
Document Name	Letter name
Selection Criteria	Student or Person ID Group If Student is selected, administrators must enter Person Number. If Person ID Group is selected, you must enter the person ID group.
Person ID Group	Dynamic person ID group: Static and dynamic
Person Number	Person number of the applicant
Automatic Term Selection	Automatic Term Selection, select Yes or No
Printer Name	Name of the printer.
Fax Number	Fax number of the applicant.
Award Year	Award year for which the student has applied.

12.56 Financial Aid - Loan Disbursement Letter - SQL Query

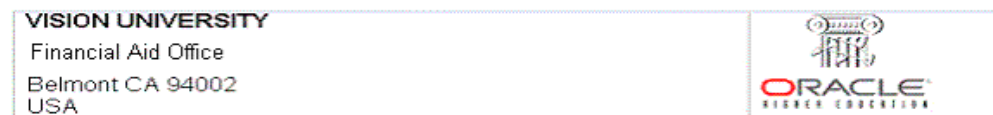
The following SQL query can be used for creating the loan disbursement letter.

```
SELECT person_id,
person_number,
prefix,
given_names,
middle_name,
surname,
email_address,
address_line1,
address_line2,
address_line3,
address_line4,
city,
county,
country,
postal_code,
state,
```

```
person_name_address,  
person_ssn,  
todays_date,  
award_year,  
NVL(salutation,prefix) salutation,  
letter_id,  
disb_name,  
disb_amt,  
disb_date  
FROM   igf_sl_disb_ltr_v  
WHERE  person_id = :p_person_id  
AND     CI_CAL_TYPE = :p_awd_cal_type  
AND     CI_SEQUENCE_NUMBER = :p_awd_seq_number
```

12.57 Financial Aid - Loan Disbursement Letter - Sample Output

The following figure shows sample output.

Figure 12–16 Financial Aid - Loan Disbursement Letter

<<person_name_address>>
<<e-mail_address>>

Student ID: <<person_number>>
Student SSN: <<person_ssn>>

<<today's_date>>

Award Year: <<award_year>>
Notice ID: <<letter_ID>>

RE: Loan Disbursement Letter

Dear, <<salutation>> <<given_names>>

<<custom text>>

The notice is to inform you of the amounts and dates of loan disbursements to your student account.

Loan Description	Loan Amount	Date Disbursed
<<disb_name>>	<<disb_amt>>	<<disb_date>>

Note: You have the right to cancel the above loan disbursement(s) to your account. In order to cancel the disbursement(s), you must contact the Financial Aid office and request a cancellation within 14 days.

Information contained in this letter is current as of the above date and its accuracy supercedes that of any previous notice of this type.

If you feel this evaluation is incorrect or if you have additional information to provide, you may contact the Financial Aid Office at (898) 3567891.

Yours sincerely,

Financial Aid Administrator

12.58 Financial Aid - Missing Items Letter

The Financial Aid - Missing Items Letter concurrent process enables administrators to send mails based on pending To Do items. This process is divided into two parts. In the first part, the concurrent process picks up the correspondence text based on pending To Do items. In the second part, the actual letter for correspondence is

printed, informing students about the necessary tasks required to complete the application.

All parameters are similar to the [Financial Aid - Loan Disbursement Letter](#) parameters.

12.59 Financial Aid - Missing Items Letter - SQL Query

The following SQL query can be used for creating the missing items letter.

```
SELECT person_name_address,  
email_address,  
todays_date,  
person_number,  
award_year,  
letter_id,  
person_ssn,  
NVL(salutation,prefix) salutation,  
person_id  
  prefix,  
  given_names,  
middle_name,  
surname,  
address_line1,  
address_line2,  
address_line3,  
address_line4,  
city,  
county,  
country,  
postal_code,  
state,  
item_code,  
item_message,  
custom_text  
FROM igf_ap_mis_itms_ltr_v  
WHERE person_id = :p_person_id  
AND      CI_CAL_TYPE = :p_awd_cal_type  
AND      CI_SEQUENCE_NUMBER = :p_awd_seq_number
```

12.60 Financial Aid - Missing Items Letter - Sample Output

The following figure shows sample output.

Figure 12-17 Financial Aid - Missing Items Letter

VISION UNIVERSITY Financial Aid Office Belmont CA 94002 USA	
---	--

<<person_name_address>>
 <<e-mail_address>>

VISION UNIVERSITY

Student ID: <<person_number>>
 Student SSN: <<person_ssn>>

<<today's_date>>

Award Year: <<award_year>>
 Notice ID: <<letter_ID>>

RE: Missing Item Letter

Dear, <<salutation>> <<given_names>>

<<custom text>>

In order to complete your financial aid application, please submit the following information to the Financial Aid office.

Missing Item	Missing Item Message
<<item_code>>	<<item_message>>

Information contained in this letter is current as of the above date and its accuracy supercedes that of any previous notice of this type.

If you feel this evaluation is incorrect or if you have additional information to provide, you may contact the Financial Aid Office at (898) 3567891.

Yours sincerely,

Financial Aid Administrator

Concurrent Process Procedures

This chapter covers features of and procedures for running the concurrent processes provided by Oracle Student System. These processes automate tasks that are performed on a regular basis during the academic year. For example, you can run a concurrent process to pre-enroll students or to transfer student deposits as credits to student accounts.

This chapter has the following sections:

- [Features and Components of a Concurrent Process](#)
- [Using Concurrent Processes](#)

A.1 Features and Components of a Concurrent Process

Most concurrent processes have an associated Parameters window. Some parameters define the intent and extent of the process while others define the *target*. Target examples include a set of students, applications, or accounts.

You can set a concurrent process to notify a person or print output each time it is run.

A concurrent process can be run either in the immediate mode or as a scheduled request. You can set up a concurrent process to run as follows:

- Periodic intervals applied to the following:
 - **The start of the previous run**
 - **The end of the previous run**
 - **A specific period**
 - **Indefinitely**

- Specific days of the week or month
- Once on a particular day and time

You run a concurrent process as a single request or as part of a request set. The request set defines the sequence.

When you run a concurrent process, use the View - Requests menu option to check the current stage. The stages are:

- **In queue and Still pending**
- **Running**
- **Completed**

The Requests window also displays the status of the request as follows:

- **Error**
- **Normal**

For every request submitted, Oracle Student System maintains the following:

- **Log** - displays the start and end date and time, the progress, the errors, whether there was an output, the number of copies printed, and the request ID.

All concurrent processes whether or not they produce an output or report, produce a log file. You can check the errors, correct these, and run the process again.

- **Output** - displays a summary of the statistics of records processed.
- **Details** - displays all the details that appear in the Submit Request window with additional details such as phase, status, requestor, scheduled start date, priority, and dates of submission, start, and completion.

A.2 Using Concurrent Processes

This section consists of the following:

- [Running a Concurrent Process in Immediate Mode](#)
- [Scheduling a Concurrent Process](#)
- [Finding and Reviewing a Submitted Request](#)

For detailed steps to complete a concurrent process request, see *Oracle Applications System Administrator's Guide*.

A.2.1 Running a Concurrent Process in Immediate Mode

This section consists of the following:

- [Running a Single Request](#)
- [Running a Request Set](#)

A.2.1.1 Running a Single Request

To run a single request:

1. Navigate to the Submit a New Request window as follows:

Requests > Concurrent Manager > Requests > Run

The Submit a New Request window appears.

2. Select the Single Request radio button.
3. Click **OK**.

The Submit Request window appears.

4. In the Name field, select the concurrent process from the drop-down list or do a partial search in the Find field using % as a wildcard.

The Parameters window appears.

5. Enter data in appropriate fields.

For information on parameters, see the associated table for a concurrent process. For concurrent processes that do not have parameters, refer to Step 7.

6. To apply the parameters, click **OK**.

The Parameters window closes, and the parameters specified appear in the Parameters field of the Submit Request window.

7. To run a concurrent process that you have run before, with the same parameters, click **Copy** in the Submit Request window. This selects the previous concurrent process request from the list of values and copies the name and parameters of the concurrent process.

Previous requests are displayed by name with the respective parameters passed for the concurrent process.

8. To send the request to the concurrent manager, click **Submit**.

A message with the request ID of the submitted request appears.

9. Click **Yes** to submit another request or run another concurrent process. Click **No** to close the Submit Request window.

A.2.1.2 Running a Request Set

To run a request set, perform the following steps:

1. Navigate to the Submit a New Request window.
2. Select the Request Set radio button, and click **OK**.
3. In the Request Set field, enter the name of the request set. Alternatively, click **Copy** to use the previous request set submission.
4. To send the request to the concurrent manager, click **Submit**.

A message with the request ID of the submitted request appears. A message with the request ID of the submitted request appears.

5. Click **Yes** to submit another request or run another concurrent process. Click **No** to close the Submit Request window.

A.2.2 Scheduling a Concurrent Process

To set up a schedule for a concurrent process, perform the following steps:

1. In Oracle Student System, navigate to the Submit a New Request window, select the Single Request radio button, and click **OK**.
2. Select a concurrent process and enter parameters for it.
3. Optionally, click **Copy** to copy the concurrent process name and parameters from a previous request.
4. For more information on how to run a concurrent process in immediate mode, see [Running a Concurrent Process in Immediate Mode](#).
5. To set up a schedule for the process, click **Schedule** and select the Periodically or the On Specific Days radio button.
 3. For periodic runs, enter the interval at which the process is to be run, and whether the interval is to be applied to the start or the end of the previous run.
 4. You can set the process to run on specific days of a month or a week.
 5. You can also enter an end date to denote the period for which these settings will apply or leave this blank to apply the schedule indefinitely. You can save this schedule and use the **Apply a Saved Schedule** to apply this to a

different concurrent process. You can choose to have the date parameters, if available, for a process to increment per the system date with each subsequent run.

6. Optionally, click **Apply a Saved Schedule** to apply an already saved schedule to the concurrent process.
7. To send the request to the concurrent manager, click **Submit**. A message with the request ID of the submitted request appears.
8. Click **Yes** to submit another request or run another concurrent process. Click **No** to close the Submit Request window.

A.2.3 Finding and Reviewing a Submitted Request

To find and review a submitted request, perform the following steps:

1. Navigate to the Find Requests window as follows:
Requests > Concurrent Manager > Requests > Concurrent
The Find Requests window appears.
2. Optionally, you can use the **View > Requests** menu option to open the Find Requests window.
3. Select an appropriate radio button to specify the level of requests you want to view:
 - Completed requests
 - Requests in progress
 - All your requests
 - Specific requests
4. To find a specific request, select the Specific Requests radio button and enter the request ID, or the name, requestor, and date of submission.
5. Click **Find**.
The Requests window appears, displaying the request details. If the number of requests retrieved is more than one, for example for a specific date of submission, all the requests are listed.
6. To view additional details of a request, select the appropriate request ID and click **View Details**.

The Request Detail window appears.

7. To view the log file, select the appropriate request ID and click **View Log**.
 8. If there are any errors, make corrections and run the concurrent process again.
- If the concurrent process has an output, click **View Output** to view a summary of the statistics on the records processed.

Program Structure and Planning History

History windows are available for selected reference and only allow records to be queried. Modifying and deleting functions are not available. If multiple children records exist for the queried record, multiple current records can be viewed.

Each field in the History Records window is captured when changed, along with the effective start date and time. Details of the change are stored, along with data about the user who initiated the change.

The section consists of the following history windows:

- [Program Type](#)
- [Program Field of Study](#)
- [Program Ownership](#)
- [Program Reference Code](#)
- [Program Unit Level](#)
- [Program Version](#)
- [Discipline](#)
- [Field of Study](#)
- [Unit Discipline](#)
- [Teaching Responsibility Override](#)
- [Funding Source Restriction](#)
- [Unit Internal Program Level](#)
- [Unit Reference Code](#)
- [Unit Version](#)

-
- [Unit Set](#)
 - [Funding Source](#)

Prerequisites

You must have inserted, updated, or deleted a base record for the history of a record to be reflected.

Steps

1. Navigate to the relevant history window.
2. Enter or query the appropriate record in the required history window. The history appears in reverse chronological order.

Note: A query must be performed if other program windows were not entered in the current session, or if another program window was used but was closed in query mode.

3. Close the window.

B.0.1 Program Type

Requests > Program Structure History > Program Type > Program Type History window

The Program Type History window displays the history of changes made to a program type. A query can be performed to retrieve only those program types defined as Award by selecting Award Program as part of the query criteria.

B.0.2 Program Field of Study

Requests > Program Structure History > Program Field of Study > Program Field of Study History window

The Field of Study History window displays the changes made to a field of study.

B.0.3 Program Ownership

Requests > Program Structure History > Program Ownership > Program Ownership History window

The Program Ownership History window displays the changes made to the ownership of a particular program version. You must perform a query if other

program windows were not entered in the current session, or if another program window was used but was closed in query mode.

B.0.4 Program Reference Code

Requests > Program Structure History > Program Reference Code > Program Reference Code History window

The Program Reference Code History window displays the history of changes made to the reference codes for a particular program version.

B.0.5 Program Unit Level

Requests > Program Structure History > Program Unit Level > Program Unit Level History window

The Program Unit Level History window displays the history of changes made to the program unit level for a particular unit version.

B.0.6 Program Version

Requests > Program Structure History - Program Version - Program Version History window

The Program Version History window displays the history of changes made to the program version. You must perform a query if other program windows were not entered in the current session, or if another program window was used but was closed in query mode.

B.0.7 Discipline

Requests > Program Structure History > Discipline > Discipline History window

The Discipline History window displays the history of changes made to a discipline group code.

B.0.8 Field of Study

Requests > Program Structure History > Field of Study > Field of Study History window

The Field of Study History window displays the changes made to a field of study. A query can retrieve all fields of study.

B.0.9 Unit Discipline

Requests - Program Structure History - Unit Discipline - Unit Discipline History window

The Unit Discipline History window displays the history of changes to the discipline for a particular unit version.

B.0.10 Faculty Unit Section History

Requests - Program Structure History - Faculty Unit Section History - Faculty Unit Section History window

The Faculty Unit Section History window displays the history of:

- Unit sections associated with a given a faculty member
- Occurrence of the unit sections, such as time and location
- Changes to the teaching responsibility for a particular unit version.

B.0.11 Teaching Responsibility Override

Requests > Program Structure History > Teaching Responsibility Override - Teaching Responsibility Override window

The Teaching Responsibility Override History window displays the history of changes made to a teaching responsibility override for a particular unit offering option.

B.0.12 Funding Source Restriction

Requests > Program Structure History > Funding Source Restriction > Funding Source Restriction History window

The Funding Source Restriction History window displays the history of changes made to the funding source restriction for a particular program version.

B.0.13 Unit Internal Program Level

Requests > Program Structure History > Unit Internal Program Level > Unit Internal Program Level History window

The Unit Internal Program Levels window displays the history of changes made to a unit internal program level code.

B.0.14 Unit Reference Code

Requests > Program Structure History > Unit Reference Code > Unit Reference Code History window

The Unit Reference Code History window displays the history of changes made to the reference code for a particular unit version.

B.0.15 Unit Version

Requests > Program Structure History > Unit Version > Unit Version History window

The Unit Version History window displays the history of changes made to a unit version. A query must be performed if other unit windows were not entered in the current session, or if another unit window was used but was closed in query mode.

B.0.16 Unit Set

Requests > Program Structure History > Unit Set > Unit Set History window

The Unit Set History window displays the history of changes applied to a unit set. A query can be performed to retrieve only the unit sets of a particular status or category. Details can be entered as part of the query criteria.

B.0.17 Funding Source

Requests > Program Structure History > Funding Source > Funding Source History window

The Funding Source History window displays the history of changes done for a funding source.

Common Terminology

C.1 Common Terminology: An Introduction

This appendix provides detailed explanations of Oracle Student System terms. These terms cover setup issues and the Program Structure and Planning subsystem.

For subsystem specific terminology, see the glossary.

The following table describes the common terminology used in Oracle Student System.

Table C-1 *Core Terminology*

Term	Description	Example
Academic Calendar	An academic calendar is the core structure for an instructional year.	Examples include: <ul style="list-style-type: none">■ Fall 2004■ Winter 2004■ Summer 2004
Attendance Mode	<p>Students can attend classes in three different modes:</p> <ul style="list-style-type: none">■ On Campus■ Off Campus■ Composite <p>Attendance mode determines fee assessment and the number of credit points earned.</p>	Students attending classes on campus could have a higher fee assessment than students who attend classes off campus.

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Awards	An award is a degree conferred at completion of program requirements.	Awards are classified into the following types: <ul style="list-style-type: none">■ Program: Bachelor of Arts■ Honorary: Non-academic degree■ Special: Medal or prize
Basic Program Details	The attributes of a program are called program details. You must define the program details to activate a program.	Examples of program details are: <ul style="list-style-type: none">■ Program code■ Title■ Version number■ Status■ Rank■ Type
Basic Unit Details	Details provided while creating a unit are called basic unit details.	Examples of basic unit details are: <ul style="list-style-type: none">■ Start Date■ Expiry Date■ Title■ Unit Status■ Unit Offering■ Unit Sections

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Basic Unit Set Details	To define a unit set, you must specify details, such as the title of the unit set, and rules governing unit sets.	<p>Examples of basic unit set details are:</p> <ul style="list-style-type: none"> ■ Start Date ■ Expiry Date ■ Title ■ Unit Status ■ Unit Offering ■ Unit Sections <p>The program BA History contains the following unit sets:</p> <ul style="list-style-type: none"> ■ Ancient Indian History ■ Medieval Indian History ■ Modern Indian History ■ Contemporary Indian History ■ South East Asian History <p>In the above unit sets, Ancient Indian History can be a major, while Contemporary Indian History can be a minor.</p>
Career	A career is a path of study consisting of individual programs that lead to a specific academic goal.	<p>Examples include careers in:</p> <ul style="list-style-type: none"> ■ Aerospace Engineering ■ International Health

Table C-1 (Cont.) Core Terminology

Term	Description	Example
Career Class Standing	Career class standing is used to assess student progress within a career or primary program based on the total number of credit hours completed.	Examples of class standing include: <ul style="list-style-type: none"> ■ Undergraduate ■ Graduate ■ Professional
Career-centric Model	<p>A career-centric model is one of the three models for calculating student fees, attendance, and credits.</p> <p>The other two models are Primary Career and Program.</p> <p>In the career-centric model, a single program is designated as the key program for each student. All fees, attendance, and credits are calculated based on the key program.</p>	If the Department of Aerospace Engineering offers several programs of study leading to the Master of Science in Engineering - Aerospace Engineering in the career-centric model, one is selected as the key program.
Cross-Listed Unit Sections Group	A cross-listed unit section group consists of similar unit sections. Cross-listed unit section groups are used by third-party scheduling software to schedule the time, assign buildings and classrooms, and arrange for media and other equipment required by the cross-listed unit sections.	NA
Cross-Listed Units Group	<p>Cross-listed units group consists of multiple units or unit sections, that share common attributes, such as the time and place where the class is held. Cross-listed groups can be defined both at unit and unit section levels.</p> <p>Units within a cross-listed units group share common attributes, such as maximum enrollment and group override limits, calendar type, alternate code, start and end dates, and location.</p>	The unit Modern English Literature 101 can be a cross-listed unit if two programs, BA Literature and BA English. Both have Modern English Literature as part of their curriculum.

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Dictionary of Occupational Titles	You can map occupational titles to programs and assign codes and alternative codes to occupational titles.	You can map the occupation Historian with the program BA History.
Discipline	<p>A discipline describes the overall field of academic learning or endeavor into which units of study are classified.</p> <p>Disciplines are subdivided into groups called discipline groups. User-defined discipline groups must be mapped to government discipline groups.</p>	<p>Discipline: Chinese History</p> <p>Discipline groups:</p> <ul style="list-style-type: none"> ■ Early Chinese Empire: 221 BC - AD 589 ■ Medieval Chinese Empire: 589 - 1644 ■ Modern China: 1644 - Present
Faculty	A faculty is full-time personnel at your institution whose regular assignments include instruction, research, and public service as a principal activity, and who hold an academic rank as professor, associate professor, assistant professor, or instructor at your institution.	NA
Fields of Study	<p>There are two types of fields of study: user-defined and government.</p> <p>A user-defined field of study permits classification of programs at a detailed level and the use of field of study names specific to your institution. Each user-defined field of study must be mapped to a more generic government field of study.</p>	<p>Given a government field of study, Animal Husbandry (0101), you map the following user-defined fields of study to it:</p> <ul style="list-style-type: none"> ■ AHDOM - Animal Husbandry - Domestic Animals ■ AHEx - Animal Husbandry - Exotic Animals

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Funding Source	<p>A funding source indicates where the funds are coming from for a particular student program attempt.</p> <p>A funding source also serves as a means of classifying programs according to the funding sources.</p> <p>You can define your own funding sources and map them to a government funding source.</p>	<p>A student could have funding from an ethnic organization only for courses in the language and culture of the ethnic group and not for general study requirements.</p>
Government Discipline Groups	<p>A government discipline group is a government grouping of units based on similarity of subject matter. The government body provides a set of codes and the code descriptions for each discipline.</p> <p>If your institution has pre-defined disciplines, you must map each code to the government disciplines.</p>	<p>Given the government discipline group Chemical Sciences (0023), you map your Chemistry discipline code to it.</p>
Government Fields of Study	<p>In some countries, such as the United Kingdom, institutions must report to the government the fields of study provided. For this purpose, you map the government field of study to the user-defined field of study.</p> <p>A government field of study is a classification of programs based on similarity in vocational specialization or principal subject matter. The government body provides a set of codes and the code descriptions for each field of study. If your institution has predefined fields of study, you must map each code to the user-defined fields of study.</p> <p>A field of study is defined at the program level and not at unit level.</p>	<p>You can map the government field of study Accounting (0046), to the subject Accounting Practices defined by your institution.</p>

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Government Funding Sources	A government funding source is a means of classifying programs according to the primary source of funding. Each user-defined funding source must be mapped to a government funding source.	If programs funded by private companies are categorized under a single funding source, HCFA, and the government fund source code is 0012, you can map your funding source code (HCFA) to the Government Fund Source (0012).
Government Program Attendance Modes	A government program attendance mode specifies the attendance mode for a student enrolled in a program. You are required to report to the government the attendance mode of each enrolled student, and then map user-defined attendance modes to government program attendance modes.	Given the government attendance mode Internal, you map your on campus program attendance mode to it.
Government Program Type	A government program type is a logical grouping of programs. Government program types must be mapped to user-defined program types.	Given the government program type, BA History (0021), you map it to the program type that includes all of your history programs.
Institution attendance type	Student attendance type determines student charges. The institution attendance type is determined by dividing the total number of credit points for all enrolled units by the annual load for a primary career or key program.	If the attendance type for a student is Full-time, that student will have higher fees than a student whose attendance type is Half-time.
Meet with Classes Group	If two or more unit sections share common subjects, they are grouped into a meet with classes group.	If program A, B and C share a common subject English, the unit sections within those programs can be grouped together as meet with classes group.

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Meet with Exams Group	<p>You can group unit sections to share common location and time for examinations. These groups are termed as meet with exam groups.</p> <p>The meet with exams group and meet with classes group do not share common attributes with cross-listed unit sections. You need to define the attributes for meet with exams groups and meet with classes groups separately.</p>	<p>If two or more unit sections share the same timetable and location, they can be grouped together as a meet with exam group.</p>
Note Type	<p>Notes can be used to attach additional information to certain data. The note type attribute allows notes to be grouped according to common characteristic.</p> <p>Notes of many types can be created, each type reflecting the purpose of the notes associated with it. Notes can be created, stored, and retrieved in text format.</p>	<p>NA</p>
Pattern of Study	<p>A pattern of study defines the predetermined unit structure in a program. Patterns of study are used to pre-enroll students in units and to advise students of unspecified unit requirements such as electives and optional units. This makes the selection of units more straightforward.</p>	<p>Students studying on campus may be offered a different pattern of units of study than those studying off campus. Full-time on campus students might be expected to complete X units spread over Y teaching periods, whereas part-time on campus and off campus students might do the same X units but over 2Y teaching periods. Different majors have different unit set requirements. These can be specified as a pattern of study.</p>

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Primary Career	<p>If a student is enrolled in multiple careers, a primary program is designated for each career and one of the primary programs is designated as the key program.</p> <p>The key program is used for assessing fees, marking attendance, and calculating credit points earned for all careers.</p>	<p>If a student enrolls in three careers: undergraduate program (BA History), a graduate program (MA History), and a doctorate (Ph.D. History), the primary programs for each career can be:</p> <p>BA History (Undergraduate)</p> <ul style="list-style-type: none"> ■ Eng 101 or 105 ■ <i>History 101</i> (Primary program, key program) ■ Math 100 or 101 <p>MA History (Graduate)</p> <ul style="list-style-type: none"> ■ European History ■ <i>United States History</i> (Primary program) ■ Asian History <p>Ph.D. in History (Doctoral)</p> <ul style="list-style-type: none"> ■ European History Asian History ■ <i>United States History</i> (Primary program) ■ Latin American History ■ Middle Eastern History <p>In the above example, the History 101 program is the primary program and also the key program. All fee assessment, credits, and attendance calculation is done based on this program.</p>

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Primary Program	<p>When a student is enrolled in multiple programs within a program type or career, one of the programs must be designated as the primary program.</p> <p>Billing, enrollment validations, and academic statistics are based on a primary program.</p>	NA
Program Attempt Status	<p>A program attempt status is used to determine if a student is currently enrolled in a program, has completed a program, or has discontinued a program.</p> <p>These statuses are not user-defined. They are derived based on a student's enrollment.</p>	<p>Examples of program attempt status include:</p> <ul style="list-style-type: none">■ Completed: Completed Program Attempt■ Deleted: Deleted Program Attempt■ Discontin: Discontinued Program Attempt■ Enrolled: Enrolled Program Attempt■ Inactive: Inactive Program Attempt■ Intermit: Intermitted Program Attempt■ Lapsed: Lapsed Program Attempt■ Unconfirm: Unconfirmed Program Attempt

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Program Class Standing	Program class standing measures student progress within a program.	<p>Examples of program class standing include:</p> <ul style="list-style-type: none"> ■ Freshman ■ Sophomore ■ Junior ■ Senior <p>These are user-defined and can be changed as required.</p>
Program Group Types	<p>Programs are classified into groups. These groups are then further classified into program group types based on common administrative needs.</p> <p>Program groups must be mapped to system group types, such as related program group and combined program group.</p>	All business management programs requiring GMAT scores can be grouped under Business Management Program Group.
Program Groups	<p>Programs belonging to a specific career or programs that result in a common award are categorized together into a single program group.</p> <p>Each program group is assigned a program group code and a group type that identifies the purpose of the program group.</p>	The program group Humanities could include the BA programs in History, Literature, Anthropology, and Fine Arts.
Program Offering Option	A program offering option is a set of attributes that defines a course offering. The major attributes are the attendance mode and attendance type. A program offering may have more than one offering option.	<p>The program offering A300 - Bachelor of Arts, version x, Standard Academic Year could be offered from the Falls Creek campus, full-time and on campus. This constitutes a program offering option.</p> <p>In the above example, attendance type is Full-time and attendance mode is On Campus.</p>

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Program Offering Unit Sets	A program offering unit set is a program with associated unit sets attached to an academic calendar.	<p>The program BA History can contain the following unit sets:</p> <p>Unit Set 1 (Summer 2004)</p> <p>History 101</p> <p>History 102</p> <p>History 103</p> <p>Unit Set 2: (Fall 2005)</p> <p>History 301</p> <p>History 302</p> <p>Unit Set 3: (Winter 2006)</p> <p>History 201</p> <p>History 203</p> <p>Each of the unit sets are associated with an academic calendars. Therefore, Unit set 1, Unit set 2, and Unit set 3 are program offering unit sets.</p>
Program Offerings	Program associated with an academic calendar.	If a program is assigned to the standard academic year calendar, then the program is available to the students for the entire academic calendar in that year.
Program Reference Details	Each program in Oracle Student System has a unique program reference code that is used for interacting with external systems.	<p>To define a reference code for a program, you must specify the following program reference details:</p> <ul style="list-style-type: none">■ Name■ Start date - 02/08/2004■ End date - 02/08/2005■ Description

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Program Stage Types	Program stage types are codes used by your institution to indicate the level of progression for a student. Each program stage has a program stage rule. These rules define the criteria for completing each stage.	<p>Given the program stages Foundation, Intermediate and Advanced, map these stages to program types Year 1, Year 2, and Year 3 and associate each program stage with a program stage type and a program stage rule:</p> <ul style="list-style-type: none"> ■ Program Stage: Intermediate ■ Program Type: YEAR 2 ■ Program Rule: Student must complete Foundation
Program Stages	A program is divided into various stages. Students must successfully complete each of these stages to qualify for awards.	A three-year degree usually has three stages: Year 1, Year 2, and Year 3.
Program Status	Program status identifies the program state and indicates whether the program is Active or Inactive.	<p>Examples of program status are:</p> <ul style="list-style-type: none"> ■ Active ■ Inactive ■ Pending ■ Planned
Program Type	Programs can be grouped into program types. Program types are comparable to government program types, but permit more detailed classification and the use of program type names specific to your institution.	<p>The Bachelors program type could include the following programs:</p> <ul style="list-style-type: none"> ■ Bachelor of Computer Science ■ Bachelor of History ■ Bachelor of English

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Program Type Groups	When different program types are classified into a single group, it is called a program type group. Similar programs can be categorized under a common program category.	Examples of program categories include: <ul style="list-style-type: none"> ■ Undergraduate ■ Non-Award ■ Corporate
Program Version Rules	Program version rules specify the criteria for completing a program.	The Bachelor of Arts in Social Science program can have a program version rule specifying that the student must complete the program stage type Foundation prior to enrollment in the program stage type Final.
Program Versions	A program version number distinguishes identical programs. Program versions differ from each other in terms of attributes, such as the start and end dates and attendance modes.	You can have one version of a BA History (version 1) program that permits an intermission during an academic year, whereas another version of the same program BA History (version 2) might not permit intermission during the course of the program.
Program	A program is a systematic plan of study and can consist of multiple units.	The units European History and Early American History can be grouped together in the program BA History.
Program-centric approach	In the program-centric approach, all programs enrolled in are included for fee assessment. A single program is designated as the key program and is used to calculate the attendance type and the credit points earned.	NA
Programs for Financial Aid	You can specify which programs are eligible for state, federal, or institution aid.	NA

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Reference Code Types	<p>A reference code type is a grouping of reference codes based on the purpose of the code.</p> <p>You can create your own reference code types and assign them to system reference code types.</p>	You can define a reference code type of Phone and assign this reference code type to all the units that can be accessed through the IVR system.
Reference Codes	<p>Reference codes are user-defined unique identifiers used by external systems, such as Voice Response (IVR), to identify programs and units.</p> <p>Reference codes are different from the system program as reference codes are used only by the external systems to identify a program or a unit. System unit codes are used by fee administrators to locate programs and units in the system.</p>	NA
Secondary Programs	Active programs within the same career with a lower priority than the primary program are called secondary programs.	<p>A student graduating in History can also enroll in other programs, such as Sociology, Music, and Anthropology.</p> <p>In this case, History will be the primary program of the student and the other programs will be secondary programs.</p>
Special Requirements	You can set up codes identifying special requirements. These are used to indicate external courses the student has completed towards the fulfillment of a program attempt.	To complete a nursing program, a student can be required to complete external courses, such as First Aid and CPR.

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Teaching Overrides	When creating a unit, you specify the numbers of teaching hours for an instructor. You can modify the teaching hours at the unit section level, if required at a later point of time. This activity is termed as teaching override.	NA
Unit	A unit is a standalone module of study associated with a unit set within a program.	Program: BA History Unit Set: History Major Core Requirements Units: HIST210GS, Western Civilization HIST250GS, American History
Unit Category	Unit categories are used to classify and group unit versions with similar characteristics. Unit categories can be used to determine student academic progression in each academic year.	If computer science students are required to attend a unit providing basic computer literacy, then you can create unit category CL to group all units that are part of the basic computer program. A student is promoted to the next academic level only if the student attends the units categorized in the CL unit category.
Unit Class	A unit class describes the time and mode of class availability. Unit classes are assigned to unit offering options.	A unit class EON can be used to define classes offered on campus in the evening. E describes Evening class and ON describes On campus mode.
Unit Curriculum	The units included as part of a curriculum are called curriculum units. These units are marked with a curriculum ID, unit code, version number, and title.	NA
Unit Internal Program Type Levels	A unit internal program type level specifies the program type to which a unit is attached.	Unit European History 301 can be linked to the program type MA History.

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Unit Level	Unit levels are used to specify the year in which units are attempted for a particular program type. Unit versions may have different unit levels, depending on the associated program type. A unit level corresponds to the year level of the programs to which the unit belongs.	<p>Level 1 can refer to a unit in the first year of an undergraduate degree course.</p> <p>Level 5 can refer to a unit in the first year of a Masters Degree.</p> <p>This does not preclude students taking a level 2 unit in the third year of a course.</p>
Unit Mode	A unit mode describes how the class is presented. Every user-defined unit mode must be mapped to a system unit mode.	<p>The system unit modes are:</p> <ul style="list-style-type: none"> ■ On campus ■ Off campus ■ Composite (combination of both on campus and off campus)
Unit Offering Pattern Notes	<p>Additional information in note format associated with unit offering patterns. Notes may be created, stored, and retrieved in the following formats:</p> <ul style="list-style-type: none"> ■ Microsoft Word ■ Microsoft Excel ■ Text ■ Other Linking and Embedding (OLE) applications 	NA

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Unit Program Type Level	<p>To be activated, a unit must be attached to a program type level. You attach a unit to a program type level to determine the role of the unit in that program and determine if the unit is to be included:</p> <ul style="list-style-type: none">■ For GPA calculation for the program■ For calculating the academic statistics for each program■ In transcripts	NA
Unit Repeat Families	<p>Unit repeat families consist of units that are required to be repeated if the student fails to complete a course. A course or line of study is referred to as a repeat family.</p>	Students who fail Biology must reappear for all the units within Biology, such as Genetic Concepts, Introduction to Microbiology.
Unit Section	<p>A unit defined in terms of attributes, such as academic calendar, location, attendance type, and attendance mode is a unit section.</p>	NA
Unit Section Details	<p>Details required to define a unit section are called unit section details. They are same as the attributes of a unit.</p>	NA

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Unit Set	<p>A unit set is a logical grouping of units. To complete a program, students must attempt a certain number of unit sets associated with the program.</p> <p>Unit sets can be academic and administrative. Academic unit sets define the path of a study a student has selected. Examples include a Major in Accounting or a Specialization in Taxation.</p> <p>Administrative unit sets can be used to restrict the set of pathways a student can follow within a program.</p>	<p>To complete the Bachelor of Business M40, a student can either take Unit Set 1 or Unit Set 2. Unit set 1 consists of the following Majors units, which constitute one pathway:</p> <ul style="list-style-type: none"> ■ Accounting ■ Banking and Finance and Economics <p>Unit Set 2 consists of the following Majors units, which constitute the second pathway:</p> <ul style="list-style-type: none"> ■ Management ■ Marketing ■ Communications <p>If unit sets are marked as administrative unit sets, then a student applying for unit set 1 is prevented from taking any major unit from unit set 2.</p>
Unit Set Categories	Unit sets can be categorized as Major, Minor, Core, or Specialization.	NA
Unit Set Rules	Unit set rules define the requirements to attempt the unit set.	Before students can nominate the unit set, they must have or be granted advance standing equal to or greater than the number of credit points specified.
Unit Set Status	A unit set status defines the state of activity of a unit version. Each unit status defined must be mapped to a system unit status.	If you use the term Current to identify a unit status, this can be mapped to the system status Active.

Table C–1 (Cont.) Core Terminology

Term	Description	Example
Unit Status	A unit status defines the state of activity of a unit version. Each user-defined unit status must be mapped to a system unit status.	Map the user-defined statuses to the system statuses as follows: <ul style="list-style-type: none">■ Current - In Progress■ Inactive - Not Available■ Planned - Future
Unit Subtitle	A unit subtitle can be any secondary title. Subtitles are modified in the case of repeatable units.	A student enrolls in a unit titled Independent Study. Because the student's focus is the French Revolution, the unit's subtitle becomes French Revolution. The following year, the same student enrolls in the Independent Study unit again, but this time to focus on France during World War II. The unit's subtitle now is WW II France.
Unit Version Rules	The unit version rules are used to determine conditions that must be met prior to enrollment in a unit. Unit version rules apply to the unit code and version number.	NA

Glossary

academic calendar

Twelve-month user-defined period representing a cycle of academic activities.

academic calendar instance

An academic calendar becomes an instance when start and end dates are provided.

academic record

The complete historical record of a student's academic course work.

academic year

An academic year consists of at least 30 weeks of instructional time.

accrual date

Date on which the interest on an educational loan begins to accrue.

academic history

Record of secondary and post-secondary units and grades at a previous educational institution.

academic index

Value calculated for a student based on academic history, previous academic performance, and admission test scores.

Account Code

General ledger account code specific to a financial reporting period.

Action Date - tracking Subsystem

Date calculated by the system, or entered by the user, when a tracking step should be completed. Initially it is calculated using the Tracking Item Start Date, Business Days Only indicator, and the number of action days for the tracking type step. For sequential steps, the completion date of the previous step is taken into account.

action date - unit assessment item

Inserted automatically when a change is made to a student unit assessment item, indicating that a change must be applied to related student unit attempts. Deleted after the change is applied to student unit attempts.

Action Date - Unit Assessment Pattern

Inserted automatically when a change is made to a student unit assessment pattern, indicating that a change needs to be applied to related student unit attempts. Deleted after the change is automatically applied.

Action Days

Maximum number of days to complete a tracking step for tracking items. Used with sequential and business-days only indicators to calculate the action date of the step.

achievement tests

Tests measuring a student's proficiency and accumulated knowledge of specific subject areas. Different schools require different achievement tests as part of their admissions requirements. Since March 1994, these tests are known as the SAT II tests. See *educational testing service* and *scholastic assessment test*.

adjusted available income

Remaining income in the federal methodology after tax and basic living allowances are subtracted.

address usage

The location or purpose, for which the address has been defined, such as, BILL TO and HOME.

admit/deny

A practice that admits marginal students, but does not award them any financial aid.

Administrative indicator

Indicates whether the unit set is Administrative or Academic. Administrative unit sets typically do not appear on official documents such as transcripts.

Administrative Unit Status

Institution-defined administrative statuses applicable to a discontinued student unit attempt, such as Withdrawn Early and Withdrawn Late - Fail. Used to determine load, progression, and grades.

admission calendar

User-defined nine or twelve month period of admission activities prior to enrollment.

admission categories

Institution-defined categories for applicant groups whose applications are processed using a common set of admission steps.

admission code

Indicates the various types of admissions that can occur. Examples include Conditional, Transfer, and Returning.

admission conditional offer status

Indicates status of an admission for which the admission offer is conditional on satisfying certain requirements. Examples include Conditional Offer Outstanding, No Conditions Attached to Offer and Conditions Pertaining to Offer Waived.

american college testing program

One of two national standardized college entrance examinations used in the United States. Most universities require either the ACT or SAT as part of an admission application. See *scholastic assessment test*.

Admission Documentation Status

Describes the status of the documentation required of an applicant by the institution.

Admission Entry Qualification Status

Qualifications that indicate applicant eligibility to apply for a program.

admission fee status

Indicates if the applicant has paid the admission fee or not.

alternative loans

Education loans offered by private lenders. These loans supplement the student and parent education loan programs available from federal and state governments.

admission offer deferment status

Describes the progress of applicant request for admission deferral. Examples include Approved, Rejected, or Withdrawn.

admission offer response status

Describes the status of applicant response to an admission offer. Examples include Accepted, Deferred, and Rejected.

admission outcome status

Describes the progress of applicant request for program admission. Examples include Offer, Rejected, Application Suspended, and No-Quota.

advanced placement test

Test to earn college credit for subjects studied in high school. Offered by the Education Testing Service in the spring. AP tests are scored on a scale from 1 to 5 where 5 is the highest possible score. See *educational testing service*.

admission process category

A category created by assigning a system admission-process type to an admission category. Admission process categories describe broad categories such as undergraduate, graduate, and professional.

admission process step

A system-defined action, set as a guideline or mandatory requirement for application processing.

admission tests

See *admission test type*.

admission test segment

Sections of an admission test. For example, the test type Test of English as a Foreign Language has the sections, Listening and Reading Comprehension, Grammar, and Writing.

admission test type

Tests that can be required for admission. Examples include Scholastic Assessment Tests (SAT), Test of English as a Foreign Language (TOEFL), Graduate Management Admission Test (GMAT), and Graduate Record Examination (GRE).

admission type

See *basis for admission type*.

admission unit outcome status

Describes applicant progress for admission to a unit. Examples include Pending, Offered, and Rejected.

admissions officer

Individual who administers the admissions process.

advanced standing

Recognition of student expertise, experience, or previous studies as fulfilling some segment of the academic requirements of the current program attempt.

advanced standing internal limit

Maximum amount of advanced standing that can be granted in a specific program.

advanced standing qualification recency

Time period, in years, that other studies are recognized for the purpose of granting advanced standing in a program.

advanced standing type

System-defined types describing the effect of granting an application for advanced standing, such as unit credit, partial credit, unit level and unit preclusion.

advanced standing unit

Unit for which advanced standing is granted. For example, students who studied music in secondary school might be precluded from the Introduction to Music unit because the class is equivalent to their prior music studies.

advanced standing unit level

Level at which advanced standing is granted.

advisor

A faculty member or designated person who guides students through academic questions, problems, and/or course work to plan and complete a degree program.

alias

See *person alias*.

allocation method

Methods for determining the number of elements used in a disbursement calculation; include STUDENT, PERCOURSE, PERUNIT, EFTSU, and CRPOINT.

allowable materials - examination

Materials that students are allowed to take into an examination.

alternate application ID

User-defined application identifier.

alternate code for calendar instance

Alternate short reference code for identifying a teaching or academic calendar instance, used for entering enrollments and unit and program offerings.

alternate code - program offering

Code identifying the program offering in order to simplify data entry.

alternate ID

See *alternate person identifier*.

alternate person

See *alternate person identifier*.

alternate person identifier

Code by which a person is recognized by other systems and organizations. Examples include government numbers, staff numbers, student identification numbers issued by other organizations, and employee numbers.

alternative exit

Allows students whose achievement satisfies the requirements of another program version to exit the program in which they are currently enrolled.

amortization

Gradual repayment of a loan over an extended period of time through periodic installments of principal and interest.

annual load value

Standard load in credit points used to calculate effective full time student units for a specified year of the program. Used only when the annual load is not constant during all years of the program.

Anonymity Indicator

Indicates that a panel member has requested anonymity from the research candidate.

AP

See *advanced placement test*.

APC

See *admission process category*.

appeal

Formal request for a financial aid administrator to review aid eligibility.

applicant intent

The reason applicant gives for applying to the program. Examples include career change, better job prospects, or to skill enrichment.

application instances

Group of applications submitted by an applicant for different programs, locations, attendance types, and attendance modes for the same academic and admission calendars, and admission process category.

application completion status

Indicates if the institution has received and verified documentary evidence required to be provided by applicant and finds it satisfactory, unsatisfactory, or incomplete.

application ID

Generated by the system and unique to an application.

application processing status

Indicates the state of an application process. Examples include Completed, Incomplete or Withdrawn.

application source

Source of an application such as hard copy, electronic, the web or flat files provided by the government or third-party agencies.

application type

Attached to an admission process category and defines different rates for application fees and enrollment deposits. Examples include Graduate and Undergraduate.

apply to program indicator

Determines whether certain encumbrance effects apply only to existing student program attempts or apply more broadly.

apportionment percentage

Percentage of the total assessment that the assessment pattern item typically represents.

articulated programs

Programs from which students can continue, with or without credit, directly into a higher program, such as an undergraduate program from which a student can continue directly into a Master's program.

assessable

Indicates whether a unit is subject to fee assessment.

Assess Fees Indicator

Indicates if a program attempt is fee assessable, based on its status. Fee assessable statuses are determined by the system.

assessment ID

See *assessment item ID*.

assessment item

Examination, paper, or other assignment required to complete for a unit.

assessment item assessor

See *assessor*.

assessment item ID

System-generated number that uniquely identifies an assessment item.

Assessment Outcome

Grade or mark for a student unit attempt assessment item. Also known as *assessment result*.

assessment pattern

Grouping of assessment items.

assessment pattern code

Institution-defined code for an assessment pattern.

assessment pattern ID

System-generated number that uniquely identifies an assessment pattern.

assessment program type

Program type to which an assessment item is restricted. If an assessment program type exists, unit assessment items can be assigned only to students whose program type is one of the restricted program types.

assessment result

Grade or mark for a student unit attempt assessment item. Also known as *assessment outcome*.

assessment type

Classification of assessment items, such as examinable or non-examinable.

assessor

Person involved with the assessment of students.

assessor type

Classifies assessors, for example, marker, tutor, and unit-chair.

asset protection allowance

A portion of parental assets that are not included in the calculation of the parent contribution by the federal methodology need analysis formula. The asset protection allowance increases with the age of the parents.

Attempt Number - Student Unit Attempt Assessment Item

Assigned to a student unit assessment item to indicate the number of times a student has attempted the assessment item.

Attendance History

Records each change in candidate attendance percentage, attendance type, start, and end date.

Attendance Mode

Describes how a student undertakes a program, for example, on-campus or off-campus. Each attendance mode must be mapped to a government attendance mode.

Attendance Percentage

Represents the total attendance of the research candidacy and coursework unit attempts.

Attendance Type

Describes whether a student is classified as full- or part-time, based on the study load.

Authorization Required Indicator

Indicates if authorization is required before a student can select a unit set as part of the chosen program.

Authorized By

Person who authorizes a unit set to be included in a student record, if authorization is required, or who authorized a unit set to be removed from the record if the unit set is specified as part of an offer of admission.

availability (Available Date)

Used in context of inquiry package items giving availability of items. For package items, the estimated date when a package item is available. The Available Date field has no functionality attached and must be manually maintained.

award

A degree, diploma, certificate or other similar formal sign of recognition for successful program completion.

award code

Identifies an award, such as Bachelor of Arts or Graduate Diploma of Education, offered by an institution.

awarding ISIR

The ISIR record that the educational institution uses to process student aid is known as an Awarding ISIR and may differ from the Payment ISIR. See ISIR and *payment ISIR*.

award program

Program that yields an award when completed successfully.

award letter

A document issued by an institution's financial aid office listing the aid awarded to the student. Students are required to sign and return a copy of the letter, accepting or declining each source of aid. The award letter is also known as Financial Aid Notification (FAN).

Award Program Only Indicator

Specifies whether a unit is available only to award program students.

award year

Academic year for which the financial aid is requested or received. Financial aid is processed based on award years, which are usually 18 to 20 months long. In most cases, award years overlap because a new cycle starts every calendar year. See *processing year*.

Base Balance

Amount upon which a percentage disbursement formula is based, including GROSS, total income disbursed for a fee type or calendar instance, NET, income available after disbursement by the last fixed formula, and REMAINDER, income remaining after all previous formulas are applied.

basis details

Details upon which an approved advanced standing is based.

Basis for Admission Type

Identifies the main criteria used in granting an applicant admission to a program. Examples include bachelor's degree, membership in academic honor societies, and work experience.

base year

Tax year prior to the academic or award year for the year that the financial aid is requested. The base year runs from January 1 of the junior year in high school through December 31 of the senior year. Financial information from the base year determines eligibility for financial aid.

Booking Cost

Cost of hiring a venue.

Business Days Only Indicator

Specifies that calculation of the Completion Required By date of a tracking item and the action dates of a tracking step account only for business days.

By-Pass Indicator

Determines if item tracking step is bypassed. If a tracking step is bypassed, action dates of subsequent steps are recalculated.

Calculation Data

Charge rates, charge elements, charge methods, rules, and load apportionment used in calculating fees.

calendar category

System-defined categorization of calendar types. Each calendar type must be assigned a calendar category for Oracle Student System to determine the functionality of each calendar type. Examples include Academic, Admission, and Assessments calendar categories.

Calendar Configuration

System-defined date aliases are mapped to institution-defined date aliases. This mapping is used in the Admissions, Enrollments and Research subsystems to enforce deadlines.

Calendar Instance

Institution-defined data that defines specific occurrences of a calendar type. Assigning a start and end date and a calendar status to a calendar type creates a calendar instance.

Calendar Instance Relationship

Indicates whether a calendar instance is subordinate or superior in relation to another calendar instance. A calendar instance can have several superior and subordinate calendar instances.

Calendar Status

Institution-defined status indicating calendar activity level. Each calendar status must be assigned a system status. These include Active, Inactive, or Planned.

Calendar Type

Represents a time span in the academic or administrative calendar. Each calendar type is assigned a calendar category for functionality within the Oracle Student System. For example, a calendar type for the calendar category Teaching can be SEM1 for semester one and SEM2 for semester 2.

Calendar Type Abbreviation

Short description of a calendar type used within the institution. Examples include ACAD YEAR for standard academic year, SEMESTER 1 for semester 1 teaching period, TRIMESTER 2 for trimester 2 teaching period, and ENROLLMENT 1 for enrollment period 1.

campus-based aid

Financial aid programs administered by the university. The Federal Government provides the university with a fixed annual allocation that is awarded by the financial aid administrator to deserving students. Such programs include the Perkins Loan, Supplemental Education Opportunity Grant, and Federal Work-Study.

career

Grouping of the program for a student (e.g., undergraduate, graduate, etc.)

Credential Types

User-defined designations for documents, such as letters of recommendation, that an applicant provides in support of an application.

capitalization

Addition of unpaid interest charges to the principal balance of an educational loan, thereby increasing the size of the loan. Interest is charged on the new balance, including both the unpaid principal and the accrued interest. Capitalizing the interest increases the monthly payment and the amount of money that must be repaid. Capitalization is also known as *compounding*.

Central Processing System

The U.S.Department of Education processing facility for application data.

ceremony closing date alias

Last date when graduands can be automatically allocated to the ceremony.

ceremony round

Period of time when a set of graduation ceremonies is conducted and includes, the pre- and post-ceremony activities.

ceremony round end date alias

End date of the period when possible graduands are automatically identified and created for the ceremony round.

ceremony round start date alias

Start date of the period when possible graduands are automatically identified and created for the ceremony round.

Charge Element

Component of a fee calculation in which a rate per element is multiplied by the number of elements representing student study load over a fee period.

Charge Method

Determines the number of charge elements used in fee calculation.

Charge Method Apportion

Relationship between fee periods and load periods that determines student study units and study load in effective full time student units, credit points, or number of units for the fee period.

Charge Rate

Rate per element that applies to a fee.

Child Organizational Unit

Subordinate organizational unit.

Citation

Text field for citation information to be read during a graduation ceremony.

Citizenship 1

Country of primary citizenship.

Citizenship 2

Country of secondary citizenship in the event of dual citizenship.

Citizenship Code

Institution-defined code describing citizenship and residency status that must be mapped to a government citizenship code.

Classification Code

Links organizational unit accounts with formulas to disburse fee income.

class schedule

The list of courses and sections offered in a given semester, including days, hours, places of meeting and names of instructors.

class standing

Year of study, for example, freshman, sophomore, junior, and senior.

Collect Mark Indicator

Specifies if marks can be recorded when entering results.

college scholarship service

An arm of the College Board and one of the agencies that processes financial aid information and applications.

common application form

A general application form that is accepted by multiple educational institutions.

Commencement Date

Date a student begins the current program attempt or a research candidate begins research. The default date can be overridden.

Commencing Student

See *new student*.

Completed Checkbox - Basis Details

Indicates if a student completed the program forming the basis of the unit advanced standing.

Completion Date of Tracking Item

Date set automatically by the system when the last tracking step is completed.

Completion Date of Tracking Step

Date when action for a tracking step is completed.

completion period

Year and time, such as end of year, midyear, or summer, when a student is likely to complete program requirements.

Completion/Progression Indicator

Indicates if advanced standing details count toward a student completion and progression requirements for a program.

Completion Required By

System date derived from the target days set for each tracking type, taking into account the Business Days Only indicator, which can be overwritten if necessary.

conditional Offer

Offer of admission to a program that depends on an applicant fulfilling specified requirements such as submitting original transcripts.

conferral date

Date an award is officially given, applied by the system to a group of graduands or manually to an individual graduand.

confirmed Date

Date when a thesis panel member accepts an invitation to become a member of the thesis examining panel.

confirmed indicator

Confirms student enrollment in a program.

confirmed offering indicator

Indicates if the offering detail has been checked and confirmed after being rolled over from a previous calendar version, and selected by default or manually.

constraints - examination

Hindrances to scheduling an examination.

contact hours

Minimum number of contact hours, or in-class time for a unit, required by a student for completing a program.

contact indicator

Indicates if a student wishes to be contacted about the available disability services.

continuing education units

Also known as CEUs. Designates credit point values associated with a unit or unit section that do not grant regular academic credit.

continuing student

See *returning student*.

contract rate

Fee rate negotiated with the institution for a student.

contribution option mapping

Maps contribution payment options to admission categories.

contribution payment option

Describes the possible contribution payment options, for example, Deferred, Upfront, and Exempt.

Convocation Members

Alumni of an institution.

cooperative education

Program where the student spends time engaged in employment related to their major in addition to regular classroom study.

coordinator - venue

Person who coordinates a venue.

corequisite

A course that must be taken at the same time as another course.

cost of attendance

Cost of attendance (COA) is the amount required to cover all education expenses. Student COA is determined by the institution.

count in progression indicator

Indicates if the advanced standing details count toward student completion and progression requirements for the program.

country code

Institution-defined code describing a country that must be mapped to a government country code.

creation date

System-generated date indicating when a record is created or date when an assessment item is attached to a student unit attempt.

creation method - grade

Describes how an assessment outcome is loaded, for example, Keying and Upload.

credit point descriptor

Institution-defined name for credit points.

credit points achievable

Number of credit points awarded on successful completion of a unit.

credit points required

Minimum number of credit points required to complete program requirements.

credits total EFTSU

Total Equivalent Full Time Student Unit (EFTSU) for a program. This term represents the student load for a unit or part of a unit expressed as a proportion of the workload for a standard annual program for students undertaking a full year of study in a particular year of a particular program.

current ID

Person number of the record chosen to be the current record in the Merge Person ID process.

custodial parent

If a student's parents are divorced or separated, the custodial parent is the one with whom the student lived the most during the past 12 months. The student's need analysis is based on financial information supplied by the custodial parent.

date alias

Institution-defined name of an event, not an actual date. Each date alias must be assigned a date alias category and can be assigned a calendar category. For example, END-LECT represents the last day of lectures in a teaching period.

date alias abbreviation

Short description of a date alias event. Examples include CENSUS DATE for census date, END LECTURES for last day of lectures in teaching period, and WD CUTOFF DATE for last day to withdraw from unit without failing.

date alias category

Institution-defined classification of date aliases according to common attributes for inquiry or reporting purposes. Each date alias must be assigned a date alias category. Examples of date alias categories include fee dates, unit withdrawal dates, and teaching dates.

date alias instance

Individual occurrence of an event created by assigning a date alias to the appropriate calendar instance, and assigning an alias value. For example, to create a date alias instance for the start of an examination period, the user can assign the date alias EXAM-ST to the appropriate calendar instance, and then assign an alias value, 05-JUN-1997.

date alias instance absolute value

Real date allocated to a date alias instance. Examples include 01-JAN-2000 and 15-NOV-1999.

date alias instance offset

Number of days, weeks, months, and years between two date alias instances, used to calculate the alias value for a date alias instance.

date alias offset

See *offset date alias*.

date alias pair

See *paired date aliases*.

date notified - special consideration application

Date inserted by the system when a special consideration application outcome notification letter was created.

declined date

Date when a proposed panel member declined to sit on a thesis examining panel.

default basis institution

Institution used as the default exemption institution when creating unit or unit level advanced standing records.

default - funding source

Indicates that a funding source is the default for students enrolled in a program. Only one funding source can be the default for a program.

default indicator - assessment item

Indicates that an assessment item is the default item for a unit.

default indicator - assessor type

Indicates that an assessor type is the default type assigned to an assessor record, automatically created by the system when a unit assessment item is created.

default item

Assessment item automatically assigned to students enrolled in a unit.

default major exemption institution

Institution used as the default exemption institution when creating advanced standing records.

default outstanding grade indicator

Indicates that a grade is the default grade used to replace blank grades by the Insert Administrative Grades process.

default pattern indicator - assessment pattern

Indicates that an assessment pattern is the default pattern for a unit. Default patterns are automatically assigned to students enrolled in a unit.

default period

Operating period for a disbursement formula, derived from the start and end date alias instances of an associated fee period, that becomes the default. See also *override period*.

deferred application

Application accepted for a future academic calendar.

deferment status

See *admission offer deferment status*.

deferred payment option

See *government contribution payment option*.

delivery types

The methods of delivery such as, fax, e-mail or print, used for correspondence with students.

deletion date

System-supplied date indicating when a record was deleted.

deletion date - unit assessment item

Date when an assessment item was deleted from a unit.

deletion date - unit assessment pattern

Date when an assessment pattern was deleted from a unit.

derived value

Values of program attributes Location Code, Attendance Mode, and Attendance Type are derived if the system determines them by examining the student unit attempts for a program. See *nominated value*.

derive grade indicator

Indicates if a grade should be derived from a mark entered by the user, and used to configure the process to enter online results.

destination program attempt

The program to which a student wants to transfer. For example, in a transfer from a Bachelor of Arts in Medieval History to a Bachelor of Arts in Renaissance History, the latter program is the destination program attempt.

differential contribution indicator

Identifies students liable for differential contributions.

direct enrollment

Enrollment in which all processes are initiated in the Enrollment subsystem.

direct loans

The William D. Ford Federal Direct Loan Program, also known as the Direct Loan Program, is a federal program where the school becomes the lending agency and manages the funds directly, with the Federal Government providing the loan funds. See *federal direct student loan program*.

disability type

Institution-defined code describing a student disability that must be mapped to a government disability type.

disbursement

Release of loan funds to the institution for delivery to the borrower. Loan funds are first credited to the student's institutional account for payment of tuition, fees, room and board, and additional charges. Excess funds are paid to the student in cash or by check.

disbursement category

Grouping of disbursement formulas in order to aggregate disbursed amounts for reporting purposes.

disbursement fixed

Predetermined rate per element where the elements are determined by the allocation method.

disbursement journal

Summarizes fee disbursement information available to an external finance system.

disbursement method

Indicates method of disbursing student fee income, whether directly to a specified organizational unit, to organizational units that own a program, or to those organizational units responsible for teaching units in a program.

disbursement percentage

Proportion of a gross, net, or remainder amount available for disbursement and split between a number of elements according to the allocation method.

disbursement snapshot

Summarizes the point-in-time disbursements for a fee type in a fee period at the Fee Type Category Instance level.

disbursement snapshot detail allocations

Summarizes the point-in-time disbursements for a fee type in a fee period at the student, student program, and student unit level.

disbursement snapshot details

Summarizes the point-in-time disbursements for a fee type in a fee period at the organizational unit level.

discipline group

Field of academic learning into which a unit can be classified.

discontinuation

A student withdraws from a program or unit attempt before it is completed.

discontinuation reason code

Identifies primary reason for discontinuation of a student program attempt.

discontinuation date

Date a student withdraws from a program or unit attempt.

discontinue enrollment indicator

Alerts staff that it is necessary to discontinue a student enrollment before authorizing a particular pending fee encumbrance.

discount full payment indicator

Indicates that a discount applies only when payment is made in full for a fee liability.

documentation status

See *admission documentation status*.

dropped unit attempts

Discontinued unit attempts that are not deleted from the database, and are not considered by other subsystems in Oracle Student System for any validations or calculations.

due date - unit assessment item

Date when a unit assessment item must be completed and submitted, typically recorded for non-examinable assessment items.

invoice workbench

Used for entering invoices in Oracle Payables.

early action

A program with earlier deadlines and notification dates than the regular admissions process. Students applying to an early action program do not commit to attending the school if admitted, unlike an early decision program. See *early decision*.

electronic data exchange

Used by participating institutions to electronically receive SARs from the federal processor. At some institutions, Electronic Data Exchange (EDE) enables students to electronically file the Free Application for Federal Student Aid (FAFSA). See *student aid report* and *free application for federal student aid*.

early admission

Program allowing high school juniors to skip their senior year and enroll in college. The term Early Admission is sometimes used to refer collectively to early action and early decision programs. See *early action* and *early decision*.

early decision

Program with earlier deadlines and notification dates than the regular admissions process. Students who apply to an early decision program commit to attending the school if admitted. Early decision can be applied to only one school.

early exit

Allows an originator to sign off on an item before all steps are complete.

EDE

See *electronic data exchange*.

effective end date alias

Date alias linked to the system effective end date of a research teaching calendar.

effective full time days total

Calculated value indicating the total number of effective full-time days a candidate has to complete research.

effective full time days used

Calculated value indicating the number of effective full-time days used as of the current date.

effective full time student units

Represents the student load for a unit or part of a unit, expressed as a proportion of the workload for a standard full-year program.

effective start date alias

Date alias linked to the system effective start date of a research teaching calendar.

eligible to enroll record

Record created during pre-enrollment for returning students.

enrolled credit points

Total credit points in which a student is enrolled.

enrolled date

Date on which a student enrolls in a unit.

enrollment category

Specifies steps for the enrollment procedure. Students with common enrollment characteristics have the same enrollment category.

enrollment due date

Due date by which a student program attempt has to be enrolled. This date defaults to the due date for enrollment specified during setup.

enrollment method

Defines method used by a student to enroll in program or unit attempts, such as face-to-face or self-service

enrollment session

Combination of academic calendar, enrollment category, and enrollment method. An example would be an academic calendar of AY04, a standard enrollment category, and the self-service enrollment method.

enrollment validations

Checks that enforce rules for enrollment specified during setup.

enrollment period

Period during which enrollment is attempted.

Encumbrance

Restricting a student from accessing institution services for reasons such as nonpayment of fees.

ETS

See *educational testing service*.

educational testing service

Company that produces and administers the SAT and other educational achievement tests. See *scholastic assessment test*.

effect type

See *system hold effect type*.

effective date

When specified as a process parameter, allows the process to access the database on a date other than the current date.

effective end date alias

Date alias linked to the system effective end date of a research teaching calendar. The effective full time days for a research teaching period is determined by the number of days between the effective start and end date aliases.

effective full time days total

Calculated value indicating the total number of effective full-time days a candidate has to complete research.

effective full time days used

Calculated value indicating the number of effective full-time days used as of the current date.

effective full time student units

Represents the student load for a unit or part of a unit, expressed as a proportion of the workload for a standard full-year program.

effective start date alias

Date alias linked to the system effective start date of a research teaching calendar. The effective full time days for a research teaching period is determined by the number of days between the effective start and end date aliases.

effective time elapsed for progression indicator

Indicates if unit attempts with a particular administrative unit status are considered to be enrolled for progression time elapsed calculations.

effectively enrolled for progression indicator

Specifies that unit attempts with a particular administrative unit status are considered to be enrolled for progression rule checks.

electronic outcome upload file

Comma-delimited text file of student unit attempt outcomes uploaded into the system.

element

See *charge element*.

element range

Range of study loads against which a rate is recorded. See also *charge element*, *charge method*, and *charge rate*.

element range rate

Rate attached to an element range.

embargo details

Text field to record the details of an embargo placed on the release of a thesis.

embargo expiry date

Date when an embargo placed on the release of a thesis expires.

end date alias - fee assessment processing

Last date when an effective date for fee assessment processing can be set.

end date of calendar instance

Date when a calendar instance is no longer effective.

end date - fee period

Last date of a fee period.

end date - grading schema

Last date of a grading schema version.

end date - institution address, location address, organizational address

Date when an address for an institution, location, or organizational unit is no longer effective.

end date - organizational unit

Date when an organizational unit is no longer effective.

end date - program offering instance

Date when a program offering instance is no longer effective.

end date - program version

Date when a program version is closed and all students have completed the program or transferred to other versions, and no additional students can enroll in the version.

end date - unit sets

Date when a unit set version is closed and all student unit sets are complete or ended.

end date - unit version

Date when a unit version is closed and no students can be enrolled.

end time - exam session

Time an examination session concludes.

end time - unit class

Time a unit class concludes.

enrollable indicator

Specifies that the program offering pattern is available for student enrollment.

enrolled credit points

Number of credit points in which a student is enrolled.

enrolled date

Date a unit was enrolled.

enrolled indicator

Specifies that a person is currently enrolled in a program.

Enrollment Category

Institution-defined classification of students who share common enrollment characteristics.

Enrollment Category Mapping

Maps enrollment categories to admission categories.

Enrollment Category Procedure Detail

Grouping of enrollment procedure steps created by assigning an enrollment method type and a student commencement type to an enrollment category.

Enrollment Category Procedure Step

Step recorded for a particular enrollment category procedure.

Enrollment Method

See *enrollment method type*.

Enrollment Method Type

How a student enrolls, whether face to face or by phone.

Enrollment Quota

Restricts the number of students that can be enrolled in a particular unit offering.

enrollment status

Indicates if a student is full-time or part-time. Generally, a student must be enrolled at least half-time, and in some cases full-time, to qualify for financial aid.

Enrollment Step

A system-defined action required to complete the enrollment process.

entitlement

Entitlement programs award funds to qualified applicants.

Entry Point Indicator

Indicates if a program offering option can be an entry point through Admissions.

Entry Qualification

See *admission entry qualification status*.

Estimated Processing Days

Expected number of days to process a special consideration application.

Evaluation Order

Sequence in which disbursement formulas are to be resolved, as determined by formula setup.

evaluators

Individuals assigned to rate applications.

examinable assessment item

Indicates an assessment item that is an examination.

Examinable Indicator

Indicates whether the assessment type is examinable or non-examinable.

Examination Instance Indicator - Supervisor Allocation

Indicates if a supervisor is assigned to a particular assessment item or items during an exam session at a particular venue.

Examination Material Type

Code indicating whether examination material is allowed, not allowed, or supplied at the time of the examination.

examination period

When examinations are held.

examination session venue

See *venue*.

Examination Supervisor - In Charge Indicator

Indicates that an examination supervisor type represents the lead or most significant supervisor for an examination session at a particular venue.

Examination Supervisor Type

Indicates supervisor level of responsibility and role.

Examination Venue Indicator

Indicates if a supervisor is assigned to a particular venue during an exam session.

Exit Program Code

Alternative exit program code.

Exit Version Set

Valid version numbers of an alternative exit program, used by the Progression subsystem.

Expected Submission Date

See *submission date - expected*.

expiry date increment

Period of time, in months, added to the current date when creating unit or unit level advanced standing records.

Expiry Date - Program Version

Date when a program version expires. Students already enrolled can remain in an expired program version, but new students are not enrolled unless they receive enough advanced standing to allow them to complete program requirements before the version ends.

Expiry Date - Unit Sets

Date when a unit set version expires, entered in the process of expiring one version and creating a new one. Students can still be enrolled in expired unit set versions until the version is ended. New students cannot select an expired unit set.

Expiry Date - Unit Version

Date when unit version expires. Students already studying this unit version remain enrolled, but no additional enrollments are allowed.

external grade

Grade equivalent to internal grading schema grade used when grades are published externally.

external limit - advanced standing

Maximum advanced standing granted in a program for studies undertaken outside an institution.

External Reference

File location of a correspondence item copy saved outside Oracle Student System; reference generated outside the Student Finance subsystem.

External Reference Type

Classifies references generated outside the Student Finance subsystem, including Debtor ID, Debit Note, Refund Cheque, and Journal.

FAA

See *financial aid administrator*.

FAF

See *financial aid form*.

FAN

See *award letter*.

FWS

See *federal work study*.

Faculty - Maximum Cross Credit Points

See *maximum cross credit points*.

FCCI

See *fee category calendar instance*.

FAT

See *financial aid transcript*.

FAO

See *financial aid office*.

FDSLP

See *federal direct student loan program*.

federal direct student loan program

Loans made by the U.S. Government directly to students and their parents through their institutions. The institution is the lending agency that manages the funds provided by the federal government. Includes the subsidized and unsubsidized Federal Direct Stafford Loan and the Federal Direct Parent Loan for Undergraduate Students (PLUS). Also known as the William D. Ford Federal Direct Loan Program. See *federal family education loan program*.

federal family education loan program

Includes the subsidized and unsubsidized Federal Stafford Loan, Federal Perkins Loan, and Parent Loan for Undergraduate Students (PLUS). Funds for these loans are provided by private lenders such as banks, credit unions, and savings and loan associations.

federal work study

The federal work-study (FWS) is a federal, need-based financial aid program providing undergraduate and graduate students with part-time employment. Although the work-study awards are made by colleges, the federal government subsidizes the student salaries. Money earned from FWS is not counted as income for the subsequent year's need analysis process.

Fee Assessment

Process of assessing student fee liabilities.

Fee Assessment Effective Date

See *effective date*.

Fee Assessment Period

See *fee period*.

Fee Assessment Rate

Charge rate applying to a fee under a specified set of conditions.

Fee Assessment Routine

Process that assesses whether students are liable for fees or are eligible for fee adjustment, and then creates assessment or adjustment transactions.

Fee Category

Identifies a distinct fee assessment group of enrolled students liable for a set of fees attached to the fee category. Fee categories are assigned to student program attempts. Examples include INTERNATNL and DOM-CONTRIBUTION, or domestic students liable for a contribution.

Fee Category Calendar Instance

Fee category operating in a specific fee period.

Fee Category Fee Liability

See *fee liability*.

Fee Category Mapping

Maps fee categories to admission categories.

Fee Disbursement Formula

One of a set of formulas that calculates and allocates disbursement amounts from income derived from a student's fee in a specific fee period. See also *allocation method, disbursement method, evaluation order, base balance, disbursement percentage, and disbursement fixed*.

Fee Encumbrance

Encumbrance applied as a result of nonpayment or underpayment of fees.

Fee Encumbrance Status

Describes the activity status of a fee encumbrance recorded against a student, and maps to a system status.

fellowship

Aid given to graduate students. Fellowships are a form of gift aid and are not repaid.

Fee Liability

Used for a single fee type within a single fee category.

federal methodology

Need analysis formula used to determine the expected family contribution. The federal methodology takes into account family size, number of family members in college, taxable and nontaxable income, and assets.

Fee Period

When a particular fee, fee category, and associated data apply.

Fee Sponsorship Status

Describes the activity status of the sponsorship of a student program attempt, and maps to a system status.

Fee Sponsor Status

Describes the standing of a particular sponsor in an institution.

Fee Structure Status

Describes the activity of a fee type, category, or liability.

Fee Type

Name of a fee, such as CONTRIBUTION, GSF, and MEDIBANK. A fee type can be assigned as a fee liability of many fee categories.

Fee Type Calendar Instance

Fee type operating in a specific fee period.

federal processor

Organization that processes information submitted on the Free Application for Federal Student Aid (FAFSA) and assesses eligibility for federal student aid.

FFELP

See *federal family education loan program*.

Field of Study

In the Program Structure and Planning subsystem, a classification of programs in terms of their subject matter. In the Research subsystem, a code representing the field of study is recorded for each candidate. The field of study percentage must total 100% for a candidacy.

financial aid

Financial aid refers to monetary assistance given to students and their families and includes grants, scholarships and self-help aid such as loans and employment.

financial aid administrator

College or university employee involved in the administration of financial aid.

financial aid form

Previously known as the Financial Aid PROFILE. The Financial Aid PROFILE is a supplementary financial aid form processed by the College Scholarship Service (CSS). A Financial Aid Profile does not require an application for federal student financial aid; the Free Application for Federal Student Aid is sufficient. The Financial Aid PROFILE is used by many private colleges and universities for awarding institutional funds.

financial aid notification

See *award letter*.

financial aid office

College or university office responsible for determining financial need and awarding financial aid.

financial aid package

Includes grants, scholarships, loans, and work-study employment offered to a student to cover education costs. Unsubsidized Stafford loans and PLUS loans are not considered part of the financial aid package, since these financing options are available to the family to help meet the expected family contribution.

financial aid transcript

Record of all federal aid received by the student at each institution attended. If a student previously attended an institution of higher education and is now applying for financial aid from an additional institution, the latter requires a FAT from each of the institutions previously attended, regardless of whether aid was received or not. This is required by federal law.

Finalized Indicator

Indicates if an outcome for a student unit attempt is finalized.

financial safety school

A school that definitely admits a student and is inexpensive enough to be attended with little or no financial aid.

Final Result

Result of the thesis examination processes. A result code is selected that must map to a system result of type FINAL. See *thesis result code*.

Final Result Indicator

Set for certain system thesis result codes to indicate that they are a final result. See *thesis result code*.

Final Title Indicator

Indicates if the specified title is the final title for the thesis.

Financial Period

Institutional financial year.

Fixed Disbursement

See *disbursement fixed*.

Forced Attendance Mode Indicator

Indicates whether a student program attempt attendance mode is forced or restricted. Selecting the check box causes the system to highlight the student program attempt attendance mode if the derived attendance mode conflicts with the forced attendance mode.

Forced Attendance Type Indicator

Indicates whether a student program attempt attendance type is forced or restricted. Selecting the check box causes the system to highlight the student program attempt attendance type if the derived attendance type conflicts with the forced attendance type.

Forced Location Indicator

Indicates whether a student program attempt location, or campus, is forced or restricted. Selecting the check box causes the system to highlight the student program attempt location if the derived location conflicts with the forced location.

Force Processing of Incomplete Package

Overrides any limitation on processing an incomplete package.

funnel status

Indicates whether a person is identified as a prospect, initiated an inquiry, or was contacted by the institution.

Formula Number

Supplied automatically by the system to identify each disbursement formula in a set. See also *fee disbursement formula*.

Funding Source

Institution-defined source of funds applicable to student program attempts.

free application for federal student aid

Form used to apply for Pell Grants and all additional federal need-based aid. No fee is charged to file a free application for federal student aid (FAFSA).

gapping

Failing to meet a student's full demonstrated need. See *unmet need*.

Generic Program

Program attribute indicating that students in a program can transfer to any program in the related group at any point during their enrollment. Unlike nongeneric programs in the group, a generic program cannot be a transfer destination.

gift aid

Financial aid, such as grants and scholarships that are not repaid.

good standing

An advanced standing status which denotes that a student is eligible to continue at or return to an institution.

Government Admission Code

Describes the matriculation category assigned by the government to an applicant on the basis of current qualifications. These codes can be mapped to user-defined codes. Code recognized by the relevant government admission center to which an institution-defined admission code is mapped.

Government Attendance Mode

Indicates whether a student undertakes a program internally or externally.

Government Attendance Type

Indicates whether a student is classified as part-time or full-time, based on study load.

Government Basis for Admission Type

Government-defined code identifying the basis for granting admission to a program of study.

Government Citizenship Code

Indicates student citizenship and residency status.

Government Contribution Band

Bands representing different contribution rates applicable to students liable for differential contributions.

Government Contribution Payment Option

Type of government-defined contribution payment option, including deferred, upfront, and exempt.

Government Country Code

Government-defined code describing a country.

Government Disability Type

Government-defined code describing student disability.

Government Discipline Group

Government-defined field of study into which a unit is classified.

Government Institution Code

Government-defined code for an institution. Institution codes defined by the institution can be mapped to government institution codes.

Government Language Code

Government-defined code describing the non-English language used in student permanent residence.

Government Level of Completion

Code recognized by the relevant government admission center, to which an institution-defined completion code can be mapped.

Government Level of Qualification

Code recognized by the relevant government admission center, to which an institution-defined level of qualifications code can be mapped.

Government Permanent Resident Code

Government-defined code indicating a student's permanent residency status.

Government Program Load

Aggregate effective full time student units for a program expressed in tenths.

Government Program Type

Government-defined classification of higher education programs. Each institution-defined program type is mapped to a government program type.

Government Type Of Activity Code

Government-defined code describing research undertaken by a research candidate.

grade

A number or letter indicating student achievement level in a unit attempt.

grade conversion

A feature that converts applicant grades or grade point averages from one institution to the grading scale in use at the admitting institution.

grade point average value

Numerical value assigned to a grade to calculate a student's grade point average.

grade rank

Compares a grade to other grades in the same grading schema, used in rules and reports.

grading schema

Describes a set of grades, marks, and results available for the assessment of student unit attempts. You can have multiple grading schemas.

graduate student

Student who has earned a baccalaureate degree and is pursuing post-baccalaureate studies.

grade exists

The action taken by the system when a grade already exists in the upload file.

Grade Inclusion Indicators

Designate where unit attempt grades can or cannot be published, for example, Noticeboard and Newspaper.

grade invalid

The action taken by the system when a grade specified in the upload file does not exist in the grading schema used.

grade point average

Measure that averages student grades, taking into account the total study load.

grant

Type of financial aid that is not repaid, based on financial need.

Grade Point Average Value

Numerical value assigned to a grade to calculate a student's grade point average.

Grade Rank

Compares a grade to other grades in the same grading schema, used in rules and reports.

grading schema

Describes a set of grades, marks, and results available for the assessment of student unit attempts. Multiple grading schemas can exist.

grading schema code

Code identifying the grading schema.

Grad Students Indicator

Indicates if a student can graduate after completing a program. This indicator is not set for non-award programs.

graduand

Student eligible or potentially eligible to graduate in a particular ceremony round, and with a graduand record created.

graduand approval status

Indicates if formal approval to graduate has been received. Examples include Waiting, Approved, and Rejected.

graduand status

Indicates current graduand progress toward graduating in a particular ceremony round. Examples include POTENTIAL, ELIGIBLE, GRADUATED, and SURRENDER.

graduand type

System-defined values assigned to graduands to define their graduation intentions, including Attending, In Absentia, Deferred and Declined.

graduation cycle

Period of time when all ceremony round activity occurs.

graduation note type

Identifies purpose of a note attached to a graduation ceremony record associated with additional required information. For example, note type GRAD-GUEST is assigned to a ceremony note listing guests attending the ceremony.

granting status

Describes the progress of an application for advanced standing.

Group Code

Code identifying a Person Number Group defined by creator.

Group ID

System-generated sequence number identifying a person number group.

Group Membership

Membership of a tracking item in a tracking group or groups.

Guaranteed - Entry Assessment Score

Score that, if achieved, guarantees an applicant an offer of admission to a program offering pattern.

HESA

See *higher education statistical agency*.

higher education statistical agency

Organization that collects information from publicly funded institutions of higher education in the United Kingdom and uses the information to compile a wide range of statistics for statutory customers.

Historical Faculty - Maximum Cross Credit Points

See *maximum cross credit points*.

History End Date - Institution History; Organizational Unit History

Date and time marking the end of a period when institution or organizational unit information was current. When changes are made, previous information is retained as a history record.

History Start Date - Institution History; Organizational Unit History

Date and time marking the start of a period when institution or organizational unit information was current. When changes are made, previous information is retained as a history record.

Hold Category

System-defined classification of an encumbrance as ADMINISTRATIVE, if it relates to an administrative matter, or ACADEMIC, if it relates to an academic matter.

Hold Effect Type

Result of applying a hold to a student or student program attempt. See *system hold effect type*.

Hold Indicator

Specifies that a person currently has a hold applied to his or her record.

Hold Schedule

Includes dates when fee holds are recorded for students defaulting on fee payments.

Hold Type

Institution-defined name that describes the reason for, or the result of, a hold.

Honors Level

Institution-defined level of a Bachelor Honors award that can be mapped to a government honors level.

Inactive Calendars

Calendars to which data can no longer be added.

Inactive Institution

Institution for which new data cannot be entered, except for maintaining institution address details.

Inactive Organizational Unit

Organizational unit for which new data cannot be entered, except for maintaining organizational unit address details.

In Charge Indicator - Exam Supervisors

Specifies a supervisor as the senior or organizing supervisor for an exam session at a particular venue.

Include Deleted Indicators

Set to display records that have been deleted.

Include Deleted Relationships Indicator

Causes deleted relationships to be displayed when a query is executed.

Include Resolved Outcomes Indicator - Non-Enrolled Unit Outcomes

Displays resolved outcomes when performing a query on non-enrolled student outcomes.

Income Type

Indicates if an assessed debt amount or a payment amount is to be disbursed.

Indicated Mailing Date

Date an inquiry package is to be mailed.

Industrial

Effective full time student units for a unit of study or part of a unit of study generated by work experience in a particular industry, reported in the student load file.

industry links

Records any industries associated with a thesis or research candidacy.

Inquiry

A request from a prospective applicant for information.

Inquiry Characteristic Type

Institution-defined classification of prospects, such as postgraduate.

Inquiry Date

Date an inquiry is made.

Inquiry Information Type

Institution-defined classification of inquiries such as accommodation and fees.

Inquiry Package Item

Information sent to the prospective applicants. Package items can be grouped by inquiry information type, by program, or by inquiry level.

inquiry package item reduction

Associating package items with an entry status, to programs for this entry status, and further to unit sets in each of the programs.

Inquiry Source Type

Classification of source that prompts an admission inquiry, such as newspaper advertisement or school liaison activity.

Inquiry Status

Institution-defined status of an inquiry. An inquiry status is first Received, then Acknowledged and finally Completed when the information requested is sent.

institutional student information report

Institutional Student Information Reports (ISIR) are the electronic versions of SARs delivered to institutions.

Institution Address

One or more institution address can be recorded, such as the address for the physical campus location and the address to which correspondence is sent.

institution - basis details

Institution where a student took the courses resulting in unit advanced standing.

Institution Code

Institution-defined code for an institution that can be mapped to a government institution code.

Institution Fee

Institution-wide fee levied once, even if a student has concurrent program attempts.

Institution History

Chronological record of changes made to data defining an institution.

Institution Status

Indicates the institution activity level. Institutional statuses are institution-defined and map to the system institution status, including ACTIVE and INACTIVE.

intermission

Period during which a student takes time off from coursework that is part of a confirmed program attempt.

intermission period

Period for which an intermission is valid. The end date specifies the date when the student is due to resume the program attempt.

Intake Target Type

Types of applicants for which an institution has established targets, such as beginning, regional, and returning students.

internal limit - advanced standing

Maximum amount of advanced standing that can be granted in a program.

International

See person international details.

International Agent Details

Details of an international agent or agency through which a student was recruited.

Invalid Mark and Grade Combination

Mark entered in system is outside the range associated with grades entered in the grading schema.

invalid mark/grade allowed indicator

Indicates if invalid mark and grade combinations can be entered, and used to configure the process for entering online results. Invalid mark and grade combinations must be corrected at a later time.

item limit

Maximum number of assessment items an assessor is allocated. Used by the assignment tracking process to limit the number of assignments sent to each assessor for marking.

ISIR

Institutional Student Information Report. A record of student's data approved by the US Department of Education, based on which institutions determine the student's need and eligibility for financial aid.

Key Check-Digit Indicator

Indicates if the two-digit check digit must be entered before an assessment result can be entered for a student, and used to configure the process for entering online results. Check digits are the last two digits of the person ID.

Language Code

Institution-defined code describing the non-English language used at student permanent residence that must be mapped to a government language code.

lapsed program attempts

A program attempt in which a student does not enroll in units within the specified time.

Last Submission Date

See *submission date - last*.

Last Year of Enrollment - Basis Details

Year when a person was last enrolled in a program forming the basis of a unit advanced standing.

Latest Processing Date

Last date an inquiry was processed by the Process Admission Inquiries concurrent process.

level

Level is an indicator of the relative demand, complexity, depth of study and autonomy of learning involved in a program.

Liability

Referring to a student, the amount the student owes as a result of fee assessment. Referring to fees, a fee type when assigned to a fee category.

Library Catalogue Number

Library catalogue number of a completed thesis.

Library Lodgement Date

Date when a research student's thesis is placed in the library.

Load Incurred Indicator

Indicates if load is incurred for a student attempt with the related administrative unit status.

Local Currency Indicator

Indicates if a currency code represents currency typically used by an institution.

Local Institution Indicator

Indicates if an institution is the home institution. Only one institution is typically identified as the home institution.

Location

Campus, study center, or other place where an institution conducts business or holds classes. Each location belongs to a location type, such as CAMPUS, which defines its use in the system.

Location Code

Code for a site owned or used by an institution, such as EXM90 to indicate an examination location.

Location - Maximum Cross Credit Points

See *maximum cross credit points*.

Location Type

Institution-defined classification of locations where an institution conducts business or holds classes. Location types can be mapped to system location types.

lockbox

Accounts maintained by institution with banks. Students use these accounts to make payments towards their charges.

Logical Delete Date - Unit Assessment Item

See *deletion date - unit assessment item*.

Logical Delete Date - Unit Assessment Pattern

See *deletion date - unit assessment pattern*.

Lower Load Limit

Lower load value of the enrollment load range, in credit points, that defines student attendance type in an academic period.

Lower Normal Rate Override Indicator

Specifies that a rate for a fee reverts to normal if the normal rate is lower than a contract rate.

Lower Range

See *element range*.

Mail Delivery Working Days

Indicates the average number of working days required for correspondence to reach an examination location using standard mail.

Mailed Date

Date an inquiry package item was mailed.

major exemption institution

Institution where over half of an advanced standing exemption was obtained.

Major Field of Study

Indicates which of the specified fields of study is the major.

Mandatory Indicator

Specifies that a particular piece of data must be recorded as part of the enrollment process.

Manual Assessment, Manual Adjustment

Distinguishes assessment transactions created for an individual student through the Manual Fee Assessment window, rather than automatically through the fee assessment process.

manual entry indicator

Specifies that a fee assessment was a manual or system-calculated assessment.

mark

Numerical value indicating student level of achievement in a unit attempt.

mark entry mandatory indicator

Specifies that a mark must be recorded and used to configure the electronic upload process and the process for entering online results.

mark/grade invalid

The action taken by the system when a mark and grade combination recorded in the upload file is invalid.

mark range - grade

Minimum and maximum numerical value limiting the range of marks required to receive a particular grade.

Maximum Cross Credit Points

Maximum number of credit points in which a student can enroll in an academic calendar outside of the enrolled program location or mode.

Maximum Intermission

Total months of intermission a student is allowed during a program.

maximum submission date

The last date by which a research thesis can be submitted.

Member Type

Institution-defined classification of organizational units by structure level. Each organizational unit must be assigned a member type, including FACULTY, SCHOOL, DEPARTMENT, and DIVISION.

merit-based

Financial aid that depends on student academic, artistic, or athletic merit not on the existence of financial need. Uses student grades, test scores, hobbies, and special talents to determine eligibility for scholarships.

Merge Table Name

Name of a database table used in the Person Number Merge process.

Milestones - Date Reached

Date when a milestone is completed, successfully or unsuccessfully.

Milestones - Due Date

Date when a milestone is to be completed, calculated from the offset days value, or entered manually.

Milestone Status

Institution-defined status showing the progress of a milestone.

Milestone Type

Institution-defined classification of milestones, such as six-month report, literature review report, and draft thesis available.

Minimum - Entry Assessment Score

Minimum score required for applicant to be considered for admission to a program offering pattern. A program offering pattern assessment score takes precedence over a minimum entry assessment score established at the program offering instance level.

Minimum Submission Date

The earliest date by which a research thesis can be submitted.

Minimum Submission Percentage

Percentage of effective full-time days that must pass before a research thesis can be submitted. This value is used to calculate submission dates for a research candidacy.

Mode - Maximum Cross Credit Points

See *maximum cross credit points*.

NSC

See *national student clearinghouse*.

Name of Institution

Institution-defined name of an institution that can be mapped to a government institution. The institution-defined name can be the same as the name of the government institution.

Negative Adjustment

Any activity that partially reduces the balance of a student's account based on fee calculation.

National Student Clearinghouse

A non-profit organization that offers degree and enrollment verification services for schools in the United States. Enrollment information provided by NSC is used to service student loans.

need-based

Financial aid that depends on the student financial situation.

need-blind

An offer of admission made to a student without considering financial need. Most schools use a need-blind admissions process.

New Student

Student enrolled in a program for the first time before the start cutoff date alias has passed.

need-sensitive

The student's financial situation is taken into account when deciding whether to admit the student.

No Assessment

Indicates if a student seeks a formal grade for a student attempt.

Nominated Value

Values of program attributes Location Code, Attendance Mode, and Attendance Type are nominated if the user enters them in the relevant fields in the Enrollments or Admissions windows. See *derived value*.

non-allowable materials - examination

Materials that students are not allowed to take into an examination.

non-examinable assessment item

Assessment item that is not an examination, for example, a research paper, a photography project, or other assignment.

No Program Attempts - Electronic Results Upload

Electronic results upload configuration setting that defines the action taken by the system if a person specified in the validation file does not have any recorded program attempts.

Note Format Type

System-defined note format, including OLE and text.

Note Types

Institution-defined classification of notes. For example, a HANDBOOK note type to refer to notes containing information for publication in the official handbook.

Notification Date

Date a debtor was notified about a fee assessment.

Notional Percentage Grade Distribution

Minimum and maximum percentage of students expected to receive a specific grade for a particular unit offering.

Number Restriction

Limits number of items relevant to a particular admission step, for example, MULTI-OFF allows a maximum number of offers to be established.

number of seats - venue

Maximum number of seats in a venue.

Number Units Before Intermission

Number of units a student must complete before intermission is possible.

Obsolete Person Number

Person number of the obsolete record in the Merge Person Number process.

occupational titles

Indicates occupations associated with programs. For example, for a Bachelor of Science in Aeronautics program, an associated occupational title would be Aeronautical Engineer.

Offer Date Response Offset

Number of days added to applicant offer date to calculate a default offer response date.

Offered Indicator

Specifies that the unit offering option is available for offering.

Official Notification

See *grade inclusion indicators*.

Offset Alias Value

See *date alias instance offset*.

Offset Date Alias

Event from which the date of another event is calculated by offset. For example, if the submission date for census information, SUBMIT-DT, is set as four weeks after the census date CENSUS, CENSUS is the offset date alias. Offsets can be positive or negative.

Offset Days for Milestone

Number of days entered for a default milestone when defining program default milestones. This number is offset from the candidate's commencement date.

Offset Duration

A period of time before or after an event used to define the date of the event. For example, if the submission date for census information, SUBMIT-DT, is set as four weeks after the census date, CENSUS, the four weeks is the offset duration. Offsets can be positive or negative.

Only as Subordinate Indicator

Specifies that the unit set can only be selected as a subordinate unit set within the related program offering. For example, a particular minor must always be selected within a particular previously selected major.

Optional Payment Indicator

Indicates whether a fee is optional or mandatory. Penalties and encumbrances do not apply to optional payments.

order in award

Order in presentation of a unit set group, or major, in a graduation ceremony.

order in ceremony

Order in award presentation in a graduation ceremony.

order in presentation

Graduand position in the presentation order of a graduation ceremony.

Order of Precedence

Evaluates the fee assessment rate that should apply when the student program study method fulfills the conditions for more than one fee assessment rate.

Organizational Unit

Business unit of an institution or organization, including faculty, school, department, and division.

Organizational Unit Account

Account linked to an organizational unit that receives disbursement income.

Organizational Unit Address

One or more addresses can be recorded for an organizational unit if they are different address types. For example, an administrative branch can have a postal address and a physical address.

Organizational Unit Code

Institution-defined code for an organizational unit. An organizational unit is identified by its code and start date.

Organizational Unit History

Chronological record of changes made to data defining an organizational unit.

Organizational Unit Location

Physical location of an organizational unit. An organizational unit can have multiple locations. Each location belongs to a location type, such as CAMPUS, which defines its use in the system.

Organizational Unit - Ownership of Unit Version

Code of an organizational unit that owns, or is responsible for, a unit.

Organizational Unit Start Date

Date when an organizational unit is effective. The organizational unit is identified by its code and start date.

Organizational Unit Status

Institution-defined status indicating the level of activity of an organizational unit record, mapped to a system status of ACTIVE or INACTIVE.

Organizational Unit Type

Institution-defined classification of organizational units. Each organizational unit must be assigned an organizational type. Examples include ACADEMIC and ADMINISTRATIVE.

outcome

Grade or mark for a student unit attempt assessment item. Also known as result.

out-of-state student

Students who do not meet the legal residency requirements for the state and are often charged a higher tuition rate at public colleges and universities.

Outcome Date

Date when an outcome is recorded for an assessment item.

overawards

Students who receive federal support cannot receive awards totaling more than \$400 in excess of financial need.

Override Amount Type

Overrides the amount type for a target.

Override Credit Point Increment

Allowable increment by which override credit points can be specified.

Override Credit Point Maximum

Maximum credit points allowed for a unit attempt.

Override Credit Point Minimum

Minimum credit points allowed for a unit attempt.

Override Credit Points Indicator

Indicates if enrolled and achievable credit points can be overridden at the student unit attempt level.

override due date - student unit attempt assessment item

Assessment item due date extension granted to a student.

Override End Time - Exam Session Instance

Used when an examination end time differs from a session end time.

Override End Time - Supervisors

When a supervisor ends supervision of an examination. If no value is specified, the system uses the end time of the exam session as the default.

Override Period

Allows adjustment within the default period of the dates between which a disbursement formula operates. See also *default period*.

Override Start Time - Exam Session Instance

Used when an examination start time differs from a session start time.

Override Start Time - Supervisors

When a supervisor starts supervision of an examination. If no value is specified, the system uses the start time of the exam session as the default.

Override Title Indicator

Indicates whether the title of a unit can be overridden at the student unit attempt level.

Override Title - Unit Sets

Overrides the unit set title within a context program version.

Overseas

Indicates an institution based in another country.

Overwrite Grades Allowed Indicator

Indicates if a saved assessment result can be overwritten when entering new results, and used to configure the process for entering online results.

Owning Location

Superior location in a location relationship. For example, a university location is an owning location of its campus locations. A location can have multiple owning locations. See also *parent and child relationship*.

packaging

Process of assembling and automatically awarding a financial aid package based on student need.

Paid Date

Date when a thesis panel member is paid.

Paired Date Aliases

Two date aliases that define a period of time. For example, the date aliases for start semester break and end semester break are paired to define the period of the break.

Paired Dates

See *paired date aliases*.

panel

Group of individuals who screen applications or interview applicants.

panel member

An individual who evaluates prospective student qualifications.

Panel Chair Indicator

Selected for those institution-defined thesis panel member types that can be the chairperson of an examining panel.

Panel Member Type

Institution-defined classification of members on a thesis panel, for example, chair, ordinary, and reserve.

panel member role

Designated responsibility of a panel member, such as final approver or reviewer.

Parent and Child Relationship

A system record can be linked to other records in a one-to-one or one-to-many relationship. For example, a school could be set up as the child of a college and the parent of associated departments.

probability value

Indicates the possibility of a prospect applying and finally enrolling as a student.

parent organizational unit

Superior organizational unit.

Parent Unit Set

Unit set that is in a superior relationship to another unit set. The parent unit set must be included as part of a student unit set attempt. It can have an open end date, if it is completed at the same time as the child unit set, or it can already be complete.

Payment Advice Number

Identifies a student or sponsor fee payment received through a bank.

Payment Due Date

Date when payment of a fee liability, or partial payment, is due.

payment ISIR

The ISIR record that Central Processing System verifies and returns to the educational institution is known as a Payment ISIR. See ISIR and *awarding ISIR*.

Payment Rank

Determines the order in which payment amounts received should be applied to student fee liabilities.

Payment Schedule

Template schedule from which payment due dates for a fee are derived.

Percentage

Percentage of credit to grant as unit advanced standing; percentage of load to attribute to a related calendar type.

Percentage Disbursement

See *disbursement percentage*.

Percentage of Program Requirements Granted

Total number of credit points of advanced standing granted divided by the number of credit points required for the program.

Percent Disbursement

When processing journals, determines the portion of calculated disbursement amounts available to budget centers at a point in time.

Permanent Resident Code

Institution-defined code indicating student permanent residency status that must be mapped to a government permanent resident code.

Permanent Resident Status

Codes indicating whether a student has permanent residency status.

Person

Any individual recorded in Oracle Student System, whether a student, staff member, or other person, with a relationship to an institution.

Person Address

Address or addresses of a person recorded in the system.

Person Alias

Alternative names by which a person is known, such as maiden names.

Person Disability

Impairment or disability recorded for a person.

Person Doesn't Exist

Electronic results upload configuration setting that defines the action taken by the system if a person recorded in the upload file does not exist in the system.

Person International Details

Details recorded for international students, including passport, visa, and citizenship details.

Person Note Type

Institution-defined classification of notes pertaining to a person, for example, ACADEMIC, ADMIN, and DISCIPLINE.

Person Number

Number that identifies a person.

Person Number Group

Group of persons with a common characteristic or characteristics.

Person Number Group Member

Person included in a *person number group*.

Person Number Type

Identifies the system or organization to which an alternate person number belongs.

Person Type

System-defined classification of a person. A person can have multiple types. Examples are faculty, staff, and applicant.

Planned Calendar

Calendars still under development and not available for use by other subsystems.

practical unit

Specifies that a unit is classified as a practical experience unit, in which case the EFTSU value for the unit is generated by practical work experience.

preclusion

A type of advanced standing granted when prior studies are not equivalent to the specified unit, but are similar. In such cases, the student is not allowed to enroll in the specified unit.

pre-enrollment

Process that creates enrollment records by copying student personal and program details from Admissions to Enrollment.

pre-enroll units indicator

Specifies that student unit attempts for a program offering pattern should be pre-enrolled as part of pre-enrollment.

Primary Assessor

See *primary assessor indicator*.

Primary Assessor Indicator

Specifies that an assessor is the senior, or principal, assessor for an assessment item.

Primary Set Indicator

Indicates that a unit set is a primary set. Primary unit sets appear on official documents. A unit set ranked lower than another unit set that exists in a student unit set attempt and administrative unit sets cannot be set as primary sets.

primary program

Program used to process enrollment validations for a program attempt in a career-centric mode. This program is also used for all progression purposes.

Prior Education

Statistical details related to prior educational experience.

Priority Code - Venue

Indicates an order of preference when allocating examinations to venues, with no associated system functionality.

processing year

Longest period of time when the processing of financial aid applications occurs for an academic year. Processing years can start 12 months in advance of an academic year.

PROFILE

A financial aid application generated by the College Scholarship Service based on the Financial Aid Form (FAF) filled out by students. Most institutions and universities use the PROFILE application to collect additional financial information. Some institutions use the PROFILE to determine student eligibility for institutional funds.

program

A program is a grouping of one or more units of study which may or may not lead to a formal award. Examples include, a generic undergraduate Bachelor of Arts program, a specific undergraduate Bachelor of Science in Computer Engineering program, and a generic Undergraduate program wherein all students are enrolled.

Program Annual Load

Number of credit points that constitute a full-time load for each year of a program version.

Program Annual Load Unit Link

Linking unit versions to program annual loads to calculate Effective Full Time Student Units.

Program Attempt

See *student program attempt*.

Program Attempt Contribution Option

Option chosen by a student for the payment of his or her contribution liability for a program attempt.

Program Attempt Status

Statuses derived by the system based on student enrollment, including Enrolled, Lapsed, Inactive, and Discontinued.

Program Category

Institution-defined classification of programs enabling inquiry, reporting, and manipulation of programs grouped together.

Program Code

Identifies a program.

Program Fee Trigger

Program code indicating that students in that program are to be assessed for a fee.

Program Group

Collection of programs with common institution-defined properties.

Program Group Code

Identifies a program group.

Program Grouped

Indicates if a unit is program grouped.

Program Group Fee Trigger

Program group code indicating that students in those programs are to be assessed a fee.

Program Group Member

Program version that belongs to a program group.

Program Group Type

Classification assigned to program groups to further define them, for example, program equivalent and common entrance requirements. Each program group must be mapped to a system program group type.

Program Note Type

Defines the purpose of a note related to a program. For example, a HANDBOOK note type can refer to notes containing information for publication in an institution's official handbook.

Program Offering

Association of a program version with a calendar type. An association with a different calendar type constitutes a new program offering. For example, the program version A300 - Bachelor of Arts, version x could be assigned to calendar Standard Academic Year, meaning that it is possible to offer the course in any calendar of that type. A course version may be offered in calendar types 'Standard Academic Year' and 'MBA Calendar', constituting two different offerings of the course. This permits different options to be applied to the separate offerings.

Program Offering Instance

Specific time when a program is offered, defined by the calendar instance when the program version is offered.

Program Status

Specifies the activity status or availability, of a program version.

Program Type

Institution-defined classification of higher education programs, such as higher doctorate, diploma, and non-award program.

Program Type - Basis Details

Program type of a program forming the basis of a unit advanced standing.

Program Type Fee Trigger

Program type code indicating that students in programs of that type are to be assessed a fee.

Program Type Group

Institution-defined collection of program types for estimating census date enrollment statistics, for example, higher degree by research and other postgraduate.

Program Type Group Code

Identifies a program type group.

Program Type Restrictions

Restrict admission categories to particular program types.

Program Version Reference

Identifies the program version to which a correspondence item is related.

Provisional Indicator

Specifies that student program admission and enrollment is pending permanent arrangements. The indicator must be selected manually.

prospect

A potential applicant who inquires about the educational institution and for whom an inquiry record is created.

publish outcomes indicator

Indicates if a student assessment results should be published.

qualification recency

Number of years during which other studies are recognized for granting advanced standing in a program.

Question or Title - Assessment Item

Question or title of a non-examinable assessment item.

Range Number

Number assigned by the system to an element range.

Rank - Unit Sets

Describes the relative position of a unit set category to other categories, for example, a major has a higher rank than a minor.

Rate

See *charge rate*.

Rate Number

Number assigned by the system to a fee assessment rate.

Rating Scale

Identifies the scale of values used to rate admission applications. For example, a rating scale named Letter can be created with rating scale values of A for Excellent, B for Average, and C for Poor.

RA

See *research assistantship*.

reaching school

A student's preferred school, but the school is not obliged to admit the student.

renewable scholarship

Scholarship awarded for more than one year.

Rating Value

User-defined value used to rate admission applications.

Re-Admission

Process by which a person seeks to re-enter a program in which he or she was previously enrolled.

Recipient

Registration ID and name of the person to whom a tracking item is sent for a particular step.

Recommendation Summary

Text field for entering a summary of assessor comments.

Recommended Panel Size

Indicates the recommended number of members for a thesis panel.

Recommended Result

Recommended assessment or thesis result submitted by an assessor.

Reference Code

Reference code for a unit from an external system. For example, a voice response code.

Reference Code Type

Classification of unit reference codes from external systems.

Reference - Unit Assessment Item

Identifying code, including numbers or other characters, of a unit assignment, examination, or other assessment item.

Refunds

See *retention schedule*.

Rejected Applicant

Applicant who has not met requirements for admission.

Repeatable Indicator

Indicates if a student can repeat a unit he or she already passed for additional credit toward program requirements.

research assistantship

Financial aid awarded to graduate students. The research assistant is required to perform research duties.

Research Indicator

Specifies that a unit is classified as a research unit.

Research Percentage - Attendance Type

Describes the attendance percentage allocated to an attendance type for research students, for example, Full-time, or 100% and part-time, or 50%.

Research Supervisor

Individual responsible for reviewing a research project.

Research Supervisor - Principal Indicator

Indicates that a research supervisor type represents the lead or most significant supervisor for a research project.

Research Supervisor Type

See *supervisor type*.

Research Topic

Subject to be studied or researched by a research student.

Reserved Enrollment

Subset of the enrollment quota that is currently reserved.

reserved seats

Seats reserved in unit sections for specific groups of students.

Resolved Indicator - Non-Enrolled Outcomes

Specifies that a non-enrolled outcome has been resolved.

Responsible Organizational Unit

Organizational unit responsible for a program version or unit set.

Restrict - Funding Source

Indicates if students enrolling in a program are restricted to funding sources appearing in this set.

Result

Grade or mark for a student unit attempt assessment item. Also known as outcome.

Result Type

Classification of assessment outcomes or grades.

Retention Schedule

Template schedule from which dates can be derived after which the institution retains all or a portion of an amount assessed for a fee, in the event that student liability reduces after reassessment. Amounts paid and not retained are available for refund.

Retroactive Date

Date up to which fee assessment can be run with a retroactive effective date.

Returning Students

Student enrolled in a program for the first time after the start cutoff date alias has passed.

review group

Group of applications, within a review profile, which is attached to appropriate evaluators.

review profile

Group of applications for evaluation. The applications can be grouped for review by applicant surname, institution address, applicant address, market code, organization, and program.

source categories

Logical groups of attributes used to define the rules involved when importing prospect or admission records from an outside source. Examples include athletic details, educational goals, academic interests, and qualifications.

source type

Type of information to be imported to Oracle Student System, such as applications, inquiries, and test scores.

step group type

System-defined classification of admission, enrollment, research, or tracking steps according to their relation to students, programs, or units.

step order

Sequence in which admission, enrollment, research, or tracking steps are performed. The step order does not apply to certain step group types.

step type

System-defined step in the admission, enrollment, research, or tracking processes.

student intake targets

Established target for the number of students of a particular type that an educational institution must enroll in a year.

Review Date - Program Version

Date when a program version is due for review. No automatic closure or rollover is implied by this date.

Review Date - Unit Sets

Date when a unit set version is due for review.

Review Date - Unit Version

Date when a unit version is due for review.

Rollover Destination Calendar Instance

Fee period into which a fee structure is to be rolled.

Rollover Source Calendar Instance

Fee period from which a fee structure is to be rolled.

Rule Check Indicator

Indicates if the system is responsible for rules relating to a student program attempt. If a student will no longer be checked by the system, selecting **No** triggers manual checking.

Rule Description

Name of a disbursement rule.

Rule Sequence Number

Identifies rule to be used in fee assessment.

Rule Text

Defines the operation of a disbursement rule.

Safety Net for Upfront Payment

Indicates if a student who has selected the up-front payment option has opted for the safety net, in which the institution changes the up-front option to the deferred option if the student cannot make the up-front payment by the due date.

satisfactory academic progress

Progress criteria that a student is required to meet to receive federal aid.

Scheduled Indicator - Assessment Item

Indicates if an examinable assessment item is included in an examination timetable.

Schedules

See *payment schedule* and *retention schedule*.

scholastic assessment test

One of two national standardized college entrance examinations used in the U.S. The other is the American College Testing Program. The SAT, previously known as the Scholastic Aptitude Test, is administered by the Educational Testing Service (ETS). Most universities require either ACT or SAT as part of an admission application. See *american college testing program*.

scholarship

An undergraduate student can receive financial aid in the form of scholarships.

Scholarships - Conditions

Describes conditions that must be met to retain a scholarship.

Scholarships - Dollar Value

Describes the dollar value of a monetary scholarship.

Scholarships - Other Benefits

Describes any other benefits of a scholarship.

Scholarship Type

Classification of scholarships that must be mapped to an organization unit or to a person number.

Scholarship Type Code

Institution-defined code to identify scholarship types.

School Code

Code that identifies a secondary education school.

School Type

System-defined classification of secondary education schools, for examples, STATE, INDEPEND, and OTHER.

Second Percentage

Used when a teaching calendar is related a second time to a load calendar instance.

secondary program

Programs in a career, other than the primary program.

Selection Criteria - Thesis Panel Type

Describes selection criteria for members of an examination panel, including required qualifications and years of experience.

self-help aid

Financial aid in the form of loans and student employment.

Self Help Group Indicator

Specifies that a student wants to participate in a self-help group for an enrolled program attempt.

Sequential Indicator

Determines if item tracking steps must be completed in sequence and if calculated action dates for steps are progressive.

Session Date

Date when an examination session is held.

Session Number

Identifies a session within a selected examination calendar.

Sessions At Institution - Exam Supervisors

Number of examination sessions a supervisor has completed at the home institution and used to indicate level of experience.

Sessions At Other Institutions - Exam Supervisors

Number of examination sessions a supervisor has supervised at other institutions, used to indicate level of experience.

show cause

Students with unsatisfactory academic progress are required to justify continuation in their program.

Show on Official Notification Indicator

Specifies that unit sets or unit attempts with a particular administrative unit status are shown on official documents, such as academic transcripts and diplomas. For academic unit sets, the default setting is select. For administrative unit sets, the default setting is deselect.

sought outcome

Special consideration outcome that a student identifies as the desired result of his or her application.

Source Categories

Source categories are logical groups of attributes used to define the rules involved when importing prospect or admission records from an outside source. They are also used to build self service application types and to declare elements as mandatory.

source program attempt

A program attempt, from which a student takes a transfer.

Special Consideration Category

Identifies the basis for a special consideration application.

Special Consideration Outcome

Result of a special consideration application.

Special Grade Type

System-generated classifications that identify students requiring deferred, special, or supplementary examinations, and grades that can be overwritten during the electronic results upload process.

special requirements

External program or units that must be taken in order to complete the program attempt.

Sponsor Code

Identifies a person or organization acting as a sponsor for a student.

Sponsorship

Arrangement in which a person or organization pays student fees in full or in part.

Sponsorship Limit

Amount that a sponsor does not exceed when paying a student's fees.

Sponsor Status

Code indicating the standing of a sponsor within an institution that maps to a system sponsor status.

Sponsor Type

Classification of sponsors, for example, CORPORATE and FACULTY.

SSIG

See *state student incentive grants*.

stage

The point in a program where a decision is taken on progression to the next phase or on awarding the relevant qualification or degree.

Standard Annual Load

Describes the load, in credit points, that a full-time student normally studies in a year if enrolled in a program, and used to calculate the relative weighting of units.

Standard Full Time Completion Time

A government code that indicates the standard time to complete the requirements of a program on a full-time basis. For example, 30 equals 3 years.

Standard Part Time Completion Time

A government code that indicates the standard time to complete the requirements of a program on a part-time basis. For example, 60 equals 6 years.

statement of educational purpose

A legal document that the student agrees to use financial aid for educational expenses only. Students must sign this document before receiving federal need-based aid.

student aid report

Summarizes information included in the Free Application for Federal Students Aid (FAFSA). Student Aid Report (SAR) must be provided to an institution because it also indicates the amount of Pell Grant eligibility, if any, and the expected family

contribution. Students receive a copy of the SAR four to six weeks after filing a FAFSA.

Start Date Alias - Fee Assessment Processing

First date when an effective date for fee assessment processing can be set.

Start Date of Calendar Instance

Date when a calendar instance becomes effective.

Start Date - Fee Period

First date of a fee period.

Start Date - Grading Schema

First date of a grading schema version.

Start Date - Institution Address, Location Address, Organizational Address

Date when an address for an institution, location, or organizational unit becomes effective.

Start Date - Organizational Unit

Date when an organizational unit becomes effective. An organizational unit is identified by its code and start date.

Start Date - Person Statistics

Date when student statistical information is effective.

Start Date - Program Offering Instance

Date when a program offering instance becomes effective.

Start Date - Program Version

Date when a program version becomes effective.

Start Date of Tracking Item

System-generated date when an item is initiated which cannot be altered.

Start Date - Unit Sets

Date when a unit set version becomes effective.

Start Date - Unit Version

Date when a unit version becomes effective.

Start Time - Exam Session

Time an examination session commences.

Start Time - Unit Class

Time a unit class commences.

state student incentive grants

State-run financial aid program for state residents. States receive equal funds from the Federal Government to help them fund the program.

Statement of Account

Used for the invoice sent to students or sponsors after fee assessment.

Status of a Thesis

System-generated status indicating the progress of a thesis, such as pending, submitted, and examined.

Step Complete Indicator

Set when a step has been completed.

Step Group Type

System-defined classification of admission, enrollment, research, or tracking steps according to their relation to students, programs, or units.

Step Order

Sequence in which admission, enrollment, research, or tracking steps are performed. The step order does not apply to certain step group types.

Step Type

System-defined step in the admission, enrollment, research, or tracking processes.

student contribution

Sum of money the Federal Government expects students to contribute to their education and included as part of the expected family contribution. Standard contributions depend on the student's income and assets but can vary from school to school.

Student Commencement Type

Indicates whether the student has enrolled for the first time or is a returning student.

student program attempt

Enrollment of a student in a particular program offering option.

Student Target

Numeric range for admission of applicants with certain characteristics. Targets can be defined for organization units, by funding source, program offering pattern, unit set, program type, program attendance mode, and by unit internal program level.

student unit attempt

Enrollment of a student in a particular unit.

student unit attempt assessment item

See *assessment item*.

SubLocation

Subordinate location in a location relationship. For example, a campus location is a sublocation of the university location. A location can have multiple sublocations. See also *parent and child relationship*.

Submission Date - Expected

Date specified by the candidate when he or she expects to submit a thesis for examination.

Submission Date - Last

Date when a thesis is submitted for examination.

Subordinate Calendars

See *calendar instance relationship*.

Subordinate Unit

Sub unit to a superior unit.

Subordinate Unit Version

Sub unit version to a superior unit version.

Superior Calendars

See *calendar instance relationship*.

Superior Unit

Unit with subunits.

Superior Unit Version

Unit version with subunit versions.

Supervision - End Date

Date when supervisor service for a research candidacy ends.

Supervision - Funding Percentage

Percentage of a research load apportioned for funding purposes to a specified organizational unit.

Supervision - Organization Unit

Organizational unit to which a supervisor is assigned.

Supervision Percentage

Percentage of supervision undertaken by individual supervisor and used to calculate the institutional research load.

Supervision - Profession

Supervisor's profession.

Supervision - Replaced Person Number

Person number of a replaced supervisor for the supervision history for a research candidacy.

Supervision - Start Date

Date when a supervisor begins supervision of a research candidacy.

supervisor instructions

Special instructions for supervisors administering an examination.

Supervisor Limit

Maximum number of supervisors typically allocated to a venue.

Supervisor Type

Institution-defined classification of supervisors for assessment or research.

Supplementary Assessment

Additional assessment item given to a student because the student failed during the normal assessment period. Supplementary assessment is typically the outcome of a special consideration application.

Supplementary Examination

Additional examination given to a student because the student failed during the normal assessment period.

Supplementary Examinations Permitted

Indicates if supplementary examinations or other assessment can be undertaken by students enrolled in a program.

Supplied Materials - Examination

Materials supplied to students for an examination.

System Admission Application Status

System-defined status to which an institution-defined admission application status is mapped, including RECEIVED, COMPLETED, and WITHDRAWN.

System Admission Conditional Offer Status

System-defined status to which an institution-defined admission conditional offer status is mapped, including PENDING, SATISFIED, and WAIVED.

System Admission Documentation Status

System-defined status to which an institution-defined admission documentation status is mapped, including NOT-APPLIC, PENDING, and SATISFIED.

System Admission Entry Qualification Status

System-defined status to which an institution-defined admission entry qualification status is mapped, including NOT-APPLIC, PENDING, and SATISFIED.

System Admission Fee Status

System-defined status to which an institution-defined admission fee status is mapped, including EXEMPT, ASSESSED, and RECEIVED.

System Admission Offer Deferment Status

System-defined status to which an institution-defined admission offer deferment status is mapped, including PENDING, APPROVED, and REJECTED.

System Admission Offer Response Status

System-defined status to which an institution-defined admission offer response status is mapped, including PENDING, ACCEPTED, and LAPSED.

System Admission Outcome Status

System-defined status to which an institution-defined admission outcome status is mapped, including PENDING, OFFER, and COND-OFFER.

System Admission Process Type

System-defined classification for direct admission processes, for example, re-admission and program transfer.

System Admission Unit Outcome Status

System-defined status to which an institution-defined admission unit outcome status is mapped, including OFFERED and REJECTED.

System Amount Type

Indicates how an intake target type is measured, including EFTSU, PERCENTAGE, PERSON, and WEFTSU.

System Assessment Type

System-defined classification of assessment types to which an institution-defined assessment type can be mapped, including ASSIGNMENT and NONCENTRAL.

System Assigned Indicator - Grading Schema

Specifies that a grade can only be assigned by system processes.

System Calendar Status

System-defined reference data assigned to a calendar status defined by an institution to indicate if a calendar is planned, active, or inactive.

System Charge Method Type

See *charge method*.

System Contribution Payment Type

System-defined classification of contribution payment types to which a government contribution payment option maps, that allows the system to determine how a student discharges a contribution liability.

System Default Indicator

The default institution-defined status if more than one is mapped to a system-defined status.

System Fee Hold Status

System-defined status to which an institution-defined fee encumbrance status is mapped, including WAIT APRVL, APPLIED, and CANCELLED.

System Fee Sponsorship Status

System-defined status to which an institution-defined fee sponsorship status is mapped, including ACTIVE, EXPIRED, and CANCELLED.

System Fee Structure Status

System-defined status to which an institution-defined fee structure status is mapped, including ACTIVE, INACTIVE, and PLANNED.

System Fee Trigger Category

Restricts triggers that can be applied to a fee liability of a particular fee type, including INSTITUTN, for institution-wide fees with no triggers attached to fee liability, and COURSE.

System Fee Type

System-defined classification of fee types, for example, CONTRIBUTION, TUITION, and OTHER. CONTRIBUTION and TUITION fee types can be reported to the government.

System Generated Indicator

Indicates if an inquiry package is produced by the system.

System Hold Effect Type

Describes the effect of placing a hold on a student or a student program attempt.

System Inquiry Status

System-defined status to which an institution-defined inquiry status is mapped.

System Institution Status

System-defined status that indicates institutional activity level and to which an institution-defined institution status is mapped. Examples include INACTIVE or ACTIVE.

System Intake Target Type

System-defined classification of intake target types, for example, COMMENCEMENT, RETURNING, TOTAL, and USER-DEFINED.

System Location Type

System-defined classification of locations used to determine associated functionality. Location type can be mapped to system location types.

System Organizational Status

System-defined status that indicates organizational unit activity level and enables functionality, and to which an institution-defined organizational unit status is mapped. Examples include ACTIVE or INACTIVE.

System Person ID Type

System-defined classification of person ID types that has associated functionality. Institution-defined person ID types are mapped to system person ID types and inherit the associated functionality.

System Program Group Type

System-defined classification of program groups. Each program group must be assigned a program group type. Examples include equivalents and common entrance requirements.

System Program Status

System-defined status that indicates the level of program activity of a program version. A program is established with a status of PLANNED. For students to be enrolled in the program, it must have a status of ACTIVE.

System Reference Code Type

System-defined classification of reference code types that defines the use of a program entry point reference code.

System Result Type

System-defined classification of result types, including PASS, FAIL, INCOMPLETE, and WITHDRAWN.

System Sponsor Status

System-defined status to which an institution-defined sponsor status is mapped, including ACTIVE and CANCELLED.

System Tracking Status

System-defined status, including ACTIVE, CANCELLED, and COMPLETE.

System Tracking Type

System-defined classification of tracking types associated with specific functionality. Each institution-defined tracking type is mapped to a system tracking type.

System Unit Mode

System-defined mode of offering a unit, including ON for on-campus, OFF for off-campus, and COMPOSITE for both on-campus and off-campus.

System Unit Status

System-defined unit status to which an institution-defined unit status is mapped, including PLANNED, ACTIVE, and INACTIVE.

system validations

System-defined checks for enrollment that are performed regardless of setup specifications. These include validating person and unit steps, such as checking for holds and closed section overrides.

Target

Minimum target to be reached.

teaching assistantship

Financial aid awarded to graduate students. A teaching assistant is required to perform teaching-related duties.

Target Days

Indicates maximum number of days a tracking item of a particular type takes to complete, used by the system with the business-days-only indicator to calculate the completion-required-by date for an item.

term

Number of months or years during which the loan is to be repaid.

term calendar

Term, in an academic period, in which students are to be pre-enrolled.

term record

Institution-defined classification of thesis types, such as written and oral.

Tax File Number Invalid Date

Date an institution is notified that a student supplies an invalid tax file number.

Tax File Number Recorded Date

Date when student tax file number is recorded in the system.

Teaching Period Code

Code used for extracting academic results for export, which is mapped to institution-defined teaching calendars.

Teaching Responsibility

Percentage allocation of teaching responsibility to an organizational unit for a unit of study.

Testamur

Official printed document indicating the conferral of an award.

Test Run

Parameter enabling the fee assessment routine, when initiated from the Fee Assessment Routine and Trace job, to run without updating the database while still supplying a report of the processing decisions.

Thesis Examination Type

Institution-defined classification of thesis types, such as written and oral.

Thesis Format

Text field to record the format of a thesis.

Thesis Panel

Administers thesis examinations.

Thesis Panel Type

Institution-defined classification of thesis panel types.

Thesis Result

Thesis assessment outcome or grade.

Thesis Result Code

Institution-defined code that must be mapped to a system thesis result code. System thesis result codes include the final results: FAIL, FAIL-ALT, NO RESULT, and PASS, and codes for incomplete, or interim, results: MINOR-REV and REV-MAJOR. Incomplete results can be recorded for a thesis examination, but not a thesis.

Thesis Result - Thesis Examination

Assessment outcome or grade of a thesis examination resulting from panel member recommendations.

Thesis Topic

Text field containing the topic of a thesis.

Time Limitation

Maximum number of years students have to complete a program offering option.

Times Keyed

Number of times an outcome has been entered.

timeslots

Period in which a student can enroll.

Title

Full title of a research student's thesis.

Title IV loans

Title IV of the Higher Education Act of 1965 created several education loan programs, collectively referred to as the Federal Family Education Loan Program (FFELP). These loans, also called Title IV loans, are subsidized and unsubsidized Federal Stafford loans, Federal PLUS loans, and Federal consolidation loans.

Title IV school code

Required for completion of the Free Application for Federal Student Aid. This code is a six-character identifier starting with one of the following letters: O, G, B, or E.

Total Credit Points Approved

Total credit points approved as advanced standing.

Total Credit Points Granted

Total credit points granted as advanced standing.

Tracking Group ID

Institution-defined code identifying a group of tracking items.

Tracking Group Status

System-derived status indicating tracking group progress, including ACTIVE, if any tracking items are active and COMPLETE, if all tracking items are complete or cancelled.

tracking ID

See *tracking item id*.

tracking item

Document or process monitored by the Tracking subsystem.

tracking item ID

System-generated identification number of a tracking item.

tracking item originator

Name and identification number of person who created a tracking item.

tracking item subject

Name and identification number of person who is the subject of a tracking item.

tracking note type

Classification of tracking notes.

tracking status

Institution-defined status of a tracking item mapped to a system tracking status.

tracking step

Activity required for processing a tracking item, identified by a system-generated number representing the order the step is completed in if the sequential indicator is set.

tracking step group type

See *step group type*.

Tracking Step Order

See *step order*.

Tracking Type

Institution-defined classification of tracking items that map to system-defined tracking types, including ASSESSMENT, MANUAL ADJ, PAYMENT, and RETENTION.

Tracking Type Step

Identified by a system-generated number and used as a default activity in the processing of a tracking item of the same type.

Transaction

Positive or negative amount that a student pays or owes.

transcript

An official statement of student academic performance and progress.

transfer

Change from original program, unit, or unit set attempt. For example, a student can transfer from a generic Bachelor of Arts in Psychology program to a more specialized one such as Bachelor of Arts in Clinical Psychology.

Trigger

Program, group of programs, unit, unit set, or trigger group recorded for a fee liability matched against student program, unit attempts, or unit set to determine if the student is liable for a particular fee.

Trigger Group

Group consisting of program, unit, and unit set triggers and acting as a single trigger.

UCAS

See *universities and colleges admissions service*.

Unconditional Offer

Standard offer of admission to a program, including details of any advanced standing offered.

undergraduate student

A student who has not yet earned a bachelor's degree, is a candidate for an additional bachelor's degree, or is pursuing additional undergraduate course work.

unearned income

Interest income, dividend income, and capital gains.

unit

Stand-alone module of study associated with a unit set within a program. Examples include, ENGL101 – Introduction to English literature, CHEM101LE – First year Chemistry Lecture and CHEM101LAB – First year Chemistry Lab.

Unit Assessment Item

See assessment item.

Unit Attempts

See student unit attempt.

Unit Attempt Status

System-defined status of a unit attempt.

Unit Category

Grouping of units with a common characteristic or characteristics.

Unit Class

Describes the time and mode of class availability. For example, a unit class EON can be used to define classes offered on campus in the evening where, E equals Evening class and ON equals On campus mode.

Unit Code

Identifies a unit. Examples include ACC120 for Introduction to Financial Accounting and BIO101 for Fundamentals of Genetics.

unit deletion cut-off date alias

If advanced standing is granted on or before this date, an enrolled student unit attempt, linked to a teaching period, can be deleted.

Unit Discontinued

Electronic results upload configuration setting that defines the action taken by the system when a unit attempt recorded in the upload file is discontinued.

Unit Grading Schema Precedence Indicator

Indicates if grading schema attached to a unit offering option takes precedence over grading schema attached to an enrolled student program offering.

Unit Internal Program Level

Internal program level grouping of a unit for calculation of weighted effective full time student units.

Unit Level

Level of a unit in a normal year.

Unit Mode

Means by which a unit can be studied. Each institution-defined unit mode must map to a system-defined unit mode, including ON for on-campus, OFF for off-campus, and COMPOSITE for both on- and off-campus.

Unit Not Enrolled

Electronic results upload configuration setting that defines the action taken by the system when a student is not enrolled in a unit recorded in the upload file.

Unit Offering

Availability of a unit version indicated by naming the teaching calendar in which a unit is to be offered.

Unit Offering Pattern

Availability of a unit version in terms of attendance mode and type.

Unit Placement

Recommendation for placement in a particular unit, based upon applicant admission test score results.

unsecured loan

Loan not backed by collateral, representing a greater risk to the lender. The lender can require a cosigner on the loan to reduce risk. If a borrower defaults on the loan, the cosigner is held responsible for repayment. Most educational loans are unsecured loans. In the case of federal student loans, the federal government guarantees repayment of the loans.

unit section

A unit section defines how a unit will be offered within a particular timeframe. For example, a unit section for ART101- is defined in terms of the location where the unit is offered (Belmont Campus), the time (evening class) and mode of class (on campus as opposed to, for example, online or by correspondence).

unit set

Unit sets are used to define a path of study undertaken to ensure the satisfactory progression and completion of student program attempts. Unit sets can be differentiated as academic or administrative.

Academic unit sets are those that further define the path of study a student has selected for example, a Major in Accounting or specialization in Taxation.

Administrative unit sets can be used to restrict the set of pathways a student can follow within a course. For example: a Bachelor of Business that has two STREAMS- Accounting, Banking and Finance and Economics MAJORS in administrative unit set STREAM1 and Management, Marketing and Communications MAJORS in administrative unit set STREAM2.

universities and colleges admissions service

Central organization that manages admissions for prospective students in the United Kingdom.

unit set attempts

Indicates the major or minor segment of the program and defines a path of study for a program attempt. For example, in a Bachelor of Science in Physics program, the major could be Thermodynamics and the minor, Particle Physics.

Unit Set Category

Institution-defined grouping of unit sets, or code representing this grouping, including MAJOR, MINOR, STRAND, and STREAM.

Unit Set Code

Identifies a unit set.

Unit Set Group

Subdivision of a program award. Allows a program award to be split across ceremonies and graduands to be presented in order within their unit set group.

Unit Set Status

Institution-defined status attributed to a unit version to define its currency in the system, and mapped to a system unit set status.

Unit Set Trigger

Unit set code indicating that students in that unit set are to be assessed a fee.

Unit Set Version

Only one version of a unit set with a status of ACTIVE and an unset expiry date can exist in the system.

Unit Set Version Number

Identifies a version of a unit set.

Unit Status

Indicates unit activity level for example, CURRENT and SUSPENDED.

Unit Trigger

Unit code indicating that students in that unit are to be assessed a fee.

unit version reference

Identifies the unit version to which a correspondence item is related.

Upfront Payment Option

See *government contribution payment option*.

Upper Load Limit

Upper load value of the enrollment load range, in credit points, that defines a student attendance type in an academic period.

Upper Range

See *element range*.

user session

The time period a user is logged on to Oracle Student System.

Variation Cut-Off Date

Date when variations to enrollments can no longer be processed, except for users with a security role permitting access to the variation cut-off date override enrollment step.

variation cutoff date

Date after which changes to enrollments can no longer be processed, except for users with a security role permitting access to the variation cut-off date override enrollment step.

variation cutoff date alias

Applies to assessment items. Used to warn against further variations in the unit assessment item in a teaching period.

venue

Place available for an examination session or site where a graduation ceremony takes place.

verification

A review process during which the financial aid office determines the accuracy of information provided on the financial aid applications.

Version Number - Grading Schema

System-generated number that identifies a version of grading schema.

Visa Type

Classification of visas for international applicants, students, staff, and faculty.

Voice Response Available Indicator

Specifies that a unit offering option is available for enrollment through voice response.

Voluntary End Indicator

Describes whether the ending of a unit set attempt is voluntary or the result of failure to progress or other administrative reason.

Voluntary Indicator - Intermission

Indicates if an intermission of a student program attempt is initiated at student request.

waitlist

Adding students to a list, if enrollment in a unit section is full, and enrolling students later if a vacancy arises or if there is an increase in class size.

work-study

A need-based financial aid program that helps students to obtain employment.

Waive Option Check Indicator

Indicates whether to waive checks applied by forced elements of a program offering option, including location, attendance mode, and attendance type.

Waive Rules

Turning off online unit rule checking function, allowing a student to enroll in a unit that goes against the rules.

Waive Rules Date

Date when a rule applying to a unit attempt is waived.

Waive Rules Person ID

Indicates a person who waives a rule applying to a unit attempt.

weighted average mark

Average percentage mark used to evaluate student progress in a program attempt.

weighted average mark weighting

Rules used to determine weighted average mark calculations.

Weighted Effective Full Time Student Units

Effective Full Time Student Units multiplied by discipline funding index multiplied by unit program level factor.

Weighted Effective Full Time Student Units Factor

Factor associated with an internal program level grouping used to determine weighted effective full time student units.

Working Time

Amount of time a student has to complete an examination.

Workload Credit Points - Lab

Institutionally-defined instructional load calculation equivalent to the lab credit points.

Workload Credit Points - Lecture

Institutionally-defined instructional load calculation equivalent to the lecture credit points.

Write Off Bad Debt Indicator

Indicates if debt is written off when a fee encumbrance is applied.

Year - Program Annual Load

Year to which an annual load figure applies.

year of program

Functionality that allows pre-enrolling students to unit sections based on their year of study in the program attempt. This functionality also enables advancing a student's year to the subsequent year based on progression results.

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