

PeopleSoft Campus Solutions 9.2 Update Image Overview

PeopleSoft Campus Solutions 9.2 Update Image 21

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PREFACE

This document provides an overview of the new features and enhancements delivered in PeopleSoft Campus Solutions (CS) 9.2 Update Image 21.

You can find the additional information referenced for each feature by copying and pasting the topic name into the Search bar of the PeopleSoft Campus Solutions Online Help website. Also, see Understanding the PeopleSoft Online Help and PeopleBooks for ways to access product documentation. Information about all PeopleSoft products is found at www.peoplesoftinfo.com.

This document will be updated with new features and enhancements delivered in CS Update Images throughout 2021. Note that Update Images are cumulative and therefore, the latest Update Image reference in this document contains all fixes, regulatory updates and enhancements delivered since PeopleSoft CS 9.2 was made generally available in December 2015. See the PeopleSoft 9.2: Campus Solutions Update Image Documentation on My Oracle Support (Doc ID 2117001.2) for comprehensive documentation.

The information included in this document is intended to help you understand the business benefits of the additional capabilities Oracle developed in the delivered update images and to help you plan your information technology (IT) projects and investments.

INTRODUCTION

As part of its Applications Unlimited Program, Oracle continues to invest in PeopleSoft applications on an ongoing basis, including frequent delivery of new functionality in its 9.2 release. Customers can selectively adopt new features and enhancements using the PeopleSoft Update Manager.

In general, no additional software license fees are associated with Update Images and capabilities delivered. The main exception to this is when new applications are introduced. New applications can require a separate license.

PeopleSoft Update Images have no effect on Oracle support policies. A detailed listing of support periods for each PeopleSoft product family and release is included in the <u>Lifetime Support Policy</u>, which is available on Oracle.com.

Oracle PeopleSoft continues to deliver new and enhanced functionality designed to help drive organizational effectiveness, provide decision support tools to facilitate intelligent business execution and offer customers more flexibility through the use of additional configuration options, integrations, and new tools capabilities.

Campus Solutions 9.2 represents a significant stage in the product's evolution. This release allows Campus Solutions to align with important strategic initiatives that PeopleSoft delivers and plans to deliver. Customers can take advantage of innovative lifecycle management tools provided by selective adoption and a number of other PeopleTools innovations including the PeopleSoft Fluid User Interface. PeopleSoft Campus Solutions plans to utilize this innovative technology to design and deliver navigation and transactions optimized for multiple device form factors.

Campus Solutions also delivers regulatory updates, enhancements, and support development to customers in CS 9.2 Update Images.

This document describes functionality that has been delivered in the following areas:

- Functionality Across Applications
- Campus Community
- Financial Aid
- Recruiting and Admissions
- Student Financials
- Student Records and Academic Advising

PEOPLESOFT CAMPUS SOLUTIONS 9.2 UPDATE IMAGE 20

Campus Solutions 9.2 Image 20 provides these features and enhancements.

Functionality Across Applications

This section describes delivered new functionality or enhancements that apply to more than one application.

Integration to Oracle Student Financial Planning Cloud Service

Oracle Student Financial Planning (SFP) Cloud Service provides a leading student-centric, cloud-based financial aid solution for higher education institutions. SFP works with thousands of financial aid sources to optimize funding for any type of higher education learning model. The SFP solution helps students identify eligibility and obtain financing so they can achieve their academic goals.

Campus Solutions customers can opt to integrate with SFP as an alternative to using Campus Solutions Financial Aid. Phase 1 of the CS/SFP Integration was introduced in Update Image 11.

Updates for image 20 include:

- Added the Disbursement Cancellation Event. This message provides information about Awards that have been
 cancelled due to a student not attending and removes the Awards from PS_ANTICIPATED_AID record. The
 message is logged with Message Class DCAN.
 - For more information, see Integrating with Oracle Student Financial Planning Cloud Service (PeopleSoft Campus Solutions 9.2: Campus Community Fundamentals).
- Added the ability to store SFP message event data in CS tables using the Load SFP Reporting Data page.
 For more information, see "Exchanging Data with Oracle Student Financial Planning Cloud Service" in Integrating with Oracle Student Financial Planning Cloud Service (PeopleSoft Campus Solutions 9.2: Campus Community Fundamentals).

Campus Community

This section describes new functionality or enhancements that apply to Campus Community.

Added Citizenship and Visa Permit Data to Fluid Self Service

Enhanced Campus Community Fluid Profile for Citizenship, Passport and Visa Permit.

For information, see "Defining Personal and Biographical Details" in Configuring Profile Information for PeopleSoft Fluid User (PeopleSoft Campus Solutions 9.2: Campus Community Fundamentals).

Phone Number Validation

Added new validations for phone number fields and changed severity of validations for email addresses to error rather than warning. Changes are applied to Campus Community Classic Self Service pages, Admin/Back Office pages, and Constituent Staging page.

There's no update to documentation.

Memberships and Languages Data Model Changes

Created new records to save Person Languages and Memberships, modified Memberships and Languages entity classes, fixed an issue in Licenses entity class for Constituent Transaction Management. This resolves issues with the data entry page and removes the reliance on HCM Job Profile records

The existing Languages and Memberships entities are updated to reference the new records as the production record rather than SCC_ACCOM_LNG_2 and SCC_ACCOM_MBR_2. The entities need to be manually synced in the Entity Registry to reflect the record changes.

- Navigate to Set Up SACR > System Administration > Entity > Entity Registry, then search for the Language and Memberships entities.
- 2. For each record on the Entity Registry page, select the action **Sync Entity**.

3. After the sync completes, click **Save**. The confirmation message can be ignored; no further code changes are required.

Existing data is migrated from JPM records to the new CS records.

For information, see "Using Staging Tables" in Working with Constituent Transaction Management (PeopleSoft Campus Solutions 9.2: Campus Community Fundamentals).

CTM Transaction Security

Added security search records and prompt records where they are missing for Constituent Transaction Management. CTM transaction security is now applied consistently across Campus Community, Student Admissions and Student Recruiting.

For information, see "Setting Up CTM Transaction Security" in Working with Constituent Transaction Management (PeopleSoft Campus Solutions 9.2: Campus Community Fundamentals).

Financial Aid

This section describes new functionality or enhancements that apply to Financial Aid.

2021-2022 College Financing Plan Updates

The U.S. Department of Education College Financing Plan (CFP) specifications are updated for the 2021-2022 Financial Aid Award Year. This update was previously released as a PRP on January 15, 2021.

There are now two versions of the CFP: one for undergraduate students and one for graduate students. There are also changes to the data presented in the CFP. Accordingly, setup options are updated:

- Changes to Setup SACR > Product Related > Financial Aid > College Financing Plan > Group Options
 - Added CFP Template field to choose undergraduate or graduate.
 - Added Template Color fields.
- Changes to Setup SACR > Product Related > Financial Aid > College Financing Plan > Institutional Information
 - Added choices to the Not Applicable Awards region:
 - Scholarships for Disadvantaged Students
 - Assistantships
 - HRSA Loans
 - ◆ Income Share Agreement
- Changes to Setup SACR > Product Related > Financial Aid > College Financing Plan > Interest Rates and Work Hours
 - Added Interest Rate and Origination Fees fields for Grad PLUS and HRSA loans.
 - Added Income Share Agreement fields.

For more information, see "Setting Up and Accessing a College Financing Plan" Notifying Student of Financial Aid Awards (PeopleSoft Campus Solutions 9.2: Financial Aid).

Displaying Non-Disbursing Financial Aid Item Types in Fluid

Modified Fluid functionality so that when a Financial Aid Item type is set as a non-disbursing item type with the Disbursement Method set to 'No', the award will not appear on the Fluid Student Self Service Disbursements page. When you click on the award from the Summary page in Student Self Service, the Award Details page does not display disbursement-related information.

For more information, see "Defining Disbursement and Anticipated Aid" in Defining Financial Aid Item Types (PeopleSoft Campus Solutions 9.2: Financial Aid).

INAS Technical Update 2122.1

The FM IPA (Income Protection Allowance) table values have been updated for the following number in family/number in college combinations: 2 in family/1 in college and 6 in family/5 in college. These updates apply only to the EFM and FM calculations.

There's no update to documentation.

Move 2018-2019 INAS Components to Financial Aid History

The 2018-2019 Institutional Need Analysis System (INAS) Components have been moved to Financial Aid History.

There's no update to documentation.

Move 2018-2019 ISIR Components to Financial Aid History

The 2018-2019 Institutional Student Information Record (ISIR) components have been moved to Financial Aid History.

There's no update to documentation.

Move 2018-2019 PROFILE Components to Financial Aid History

The 2018-2019 PROFILE components have been moved to Financial Aid History.

There's no update to documentation.

Move 2018-2019 Verification Components to Financial Aid History

The 2018-2019 Verification components have been moved to Financial Aid History.

There's no update to documentation.

Recruiting and Admissions

This section describes new functionality or enhancements that apply to Recruiting and Admissions.

UCAS/UTT Updates

 When importing applicant data, the initial matching for UCAS and UTT no longer uses the unique learner number (ULN).

For information, see "Importing New Applicants" in (GBR) Managing UCAS and UTT Applications (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions).

For UCAS and UTT existing applicants, if an update is imported from StarN, StarA, or both, the existing single
applicant record (SAD_UC_APPLREC) is updated with the new timestamp and other values depending on which
record is imported.

Student Records and Academic Advising

This section describes new functionality or enhancements that apply to Student Records.

Fluid Enrollment Appointments

Added Fluid Enrollment and Shopping Cart Validation Appointments to student Self Service.

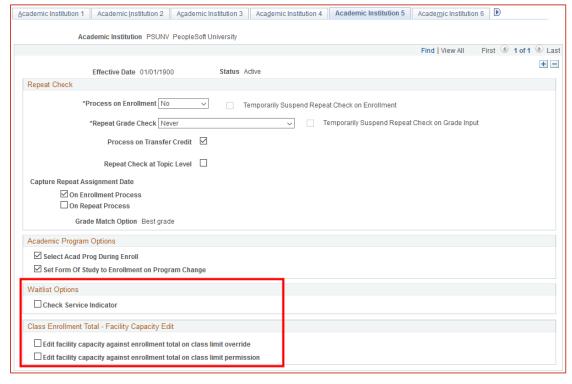
There's no update to documentation.

Facility Capacity Enrollment Prevention Enhancement

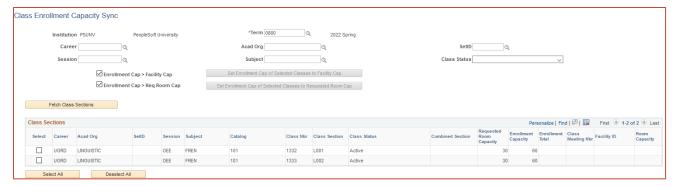
Modified the Enrollment Engine to validate facility limits against enrollment total of class based on the institution's setup. Created a new page to review and manage enrollment capacities compared to facility and requested room capacities. Modified institution pages to enable the checking, warning or rejecting of scheduling, or enrolling in any class that exceeds the facility limits or requested room capacity established by the institution.



New section on the Academic Institution 2 page



New sections on the Academic Institution 5 page



Class Enrollment Capacity Sync page

For information, see:

- "Defining Academic Institutions" in Designing Your Academic Structure (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
- "Scheduling New Classes" in Managing the Schedule of Classes (PeopleSoft Campus Solutions 9.2: Student Records)
- "Setting Up Repeat Checking for Academic Institutions" in Setting Up Repeat Checking (PeopleSoft Campus Solutions 9.2: Student Records)

Fluid Weekly Calendar

The Student's Weekly Calendar in Grid Format has been added to Fluid Self Service.

There's no update to documentation.

TCSI Update

Support for the Australian government reporting TCSI solution, which merges the existing CART and HEIMS solutions, replacing the existing HEPCAT process with RESTful APIs.

- The Integration Broker service operations are delivered containing REST base URLs with test endpoints. You need to change these URLs to production endpoints for production environments.
- Updates to the Devices page: device keys can now be automatically refreshed.
- Numerous updates and fixes from POC testing.

For information, see (AUS) Submitting Government Reports using TCSI Web Services on My Oracle Support (Doc ID 2692408.1).

HELP Loan Update

From January 1, 2020, HECS-HELP loan amounts combine with FEE-HELP amounts to form students' combined HELP balance and usage. Because of this, the HECS reconciliation process will reference the students' HELP balance before deferral amounts are posted to their accounts. To retrieve HELP balances, the HELP Balances API is used.

For information, see "Using the Combined HELP Limit API" in (AUS) Setting Up and Using Australian Loan Processing (PeopleSoft Campus Solutions 9.2: Student Financials).

HESA Student Return 2020-2021

- These fields have been removed:
 - Course.FEQAIMC
 - Instance.CSTAT
 - Instance.DESTIN
 - Instance.FRANPART
 - Instance.GLHRS
 - Instance.NOUNTACH
 - Instance.NUMUNITS
 - Instance.PROGRESS

- On these pages, there's a new field, Postcode, which supports the derivation of Delivery Organisation and Location in the student return:
 - Program HESA Data
 - Plan HESA Data
 - Sub-Plan HESA
- On the HESA Instance page:
 - In Financial Support:
 - Scheme ID and Offer ID are no longer required because the Data Futures schema has been updated. Type (FINSUPTYPEID) is reported directly in StudentFinancialSupport rather than via FinancialSupportScheme.
 - StudentFinancialSupport is now always reported in the context of a Student Course Session, so the Session Specific flag is no longer required.
 - Access participation spending (APPSPEND) is added to both the Student and Data Futures returns as part of Financial Support and Student Financial Support, respectively.
 - In Research Data:
 - For Student Return 2020–2021, REF Unit 2021 is required and REF Unit 2014 is removed.
 - The validation is updated to include REF Unit 2021 so that the combination of REF Unit 2021, REF Unit 2014, RAE Unit and Collaborating Provider must be unique.
 - You can define records with just REF Unit 2021 and Percentage.
- On the Advisor HESA Data page:
 - The validation is updated to include REF Unit 2021 so that the combination of REF Unit 2021, REF Unit 2014, RAE Unit and Collaborating Provider must be unique.
 - You can define records with just REF Unit 2021 and Percentage.
- There are updates to derivations for a number of existing fields.
- Derivations have been added for these new fields:
 - EntryProfile.APELCRD
 - EntryProfile,CRDTPTSTU
 - EntryProfile,CRDSCM
 - EntryProfile.ESTRANGED
 - FinancialSupport.APPSPEND
 - Student.BSLUSER
 - Student.SERLEAVE

For information, see PeopleSoft Campus Solutions 9.2: Student Records:

- (GBR) Managing HESA Returns
- (GBR) HESA Field Derivation

PEOPLESOFT CAMPUS SOLUTIONS 9.2 UPDATE IMAGE 21

Campus Solutions 9.2 Image 21 provides these features and enhancements.

Functionality Across Applications

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Oracle Student Financial Planning (SFP) Cloud Service provides a leading student-centric, cloud-based financial aid solution for higher education institutions. SFP works with thousands of financial aid sources to optimize funding for any type of higher education learning model. The SFP solution helps students identify eligibility and obtain financing so they can achieve their academic goals.

Campus Solutions customers can opt to integrate with SFP as an alternative to using Campus Solutions Financial Aid. Phase 1 of the CS/SFP Integration was introduced in Update Image 11.

Updates for image 21 include:

- Added support to process estimated awards only for the current academic year as setup in the SFP Term Projection
 page. This update included adding the NFF Estimated Award Start Date field to the page. Use the field to enter a
 date when you want to start having SFP estimated Non-Federal Funds inserted into the CS PS_ANTICIPATED_AID
 record. With this expanded functionality, the NFF Estimated Award Start Date will control when the NFF estimated
 awards can be displayed to students in self-service or for SF processing.
 - For more information, see "Setting Up Integration with Oracle Student Financial Planning Cloud Service" in Integrating with Oracle Student Financial Planning Cloud Service (PeopleSoft Campus Solutions 9.2: Campus Community Fundamentals).
- We've expanded the CS SFP Reporting functionality to support SFP SAP data by creating new reporting records for <FASSAPACADEMICINFORMATIONEVENT>. For this event that supports Satisfactory Academic Progress processing, the message payload contains only the key information needed to invoke a web service that returns the payload of SFP data. This data is then parsed into CS reporting tables.

For more information, see "Exchanging Data with Oracle Student Financial Planning Cloud Service" in Integrating with Oracle Student Financial Planning Cloud Service (PeopleSoft Campus Solutions 9.2: Campus Community Fundamentals).

Campus Community

This section describes new functionality or enhancements that apply to Campus Community.

Update for Residency Appeal Entity

This update enables the data update rule logic for the Residency Appeal entity.

If you select the Apply Data Update Rule check box for Residency Appeal in the Entity Registry, you need to run the Entity Property Sync process. You also need to refresh any data update rules that are used in CTM processing in the Data Update Rule Entry so that you can add the Residency Appeal entity. And lastly, set the appropriate Update Action.

There's no update to documentation.

Update to Phone Number Validation

To be consistent with the CS Fluid self-service pages and new validation introduced in HCM, validation is required for the phone number fields on the Phone Numbers and Add/Update a Person pages. The formatting is updated to remove periods, and the validation is updated to allow the plus sign in the phone field (for example, +65...) for international phone numbers.

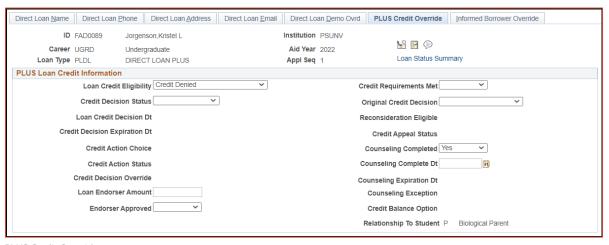
For information see My Oracle Support (Doc ID 2757217.1).

Financial Aid

This section describes new functionality or enhancements that apply to Financial Aid.

2021-2022 Common Origination and Disbursement (COD) Updates

- Updated Direct Loan COD for Aid Year 2021-2022 including the new RelationshipToStudent field. The following pages were updated:
 - Financial Aid > Loans > Direct Lending Management > Manage DL Application > Application Misc Data > PLUS Loan Credit Information.
 - Financial Aid > Loans > Direct Lending Management > Override Loan Application Data > PLUS Credit
 Override > PLUS Loan Credit Information.
 - Financial Aid > File Management > COD Full Participant > View COD Data > COD Award > Counseling Information.



PLUS Credit Override page

For more information, see "Processing and Reviewing Direct Lending Origination Information" and "Viewing and Overriding Bio/Demo Data for Direct Lending" in Processing Direct Loans (PeopleSoft Campus Solutions 9.2: Financial Aid).

 Updated Pell Grant COD for Aid Year 2021-2022, and adopted the new 4.0e schema beginning with Aid Year 2021-2022.

There's no update to documentation.

 Delivered objects common to both Direct Loan and Pell Grant for 2021-2022 COD Regulatory Updates; including common changes for the new RelationshipToStudent field.

There's no update to documentation.

Added ability to update Informed Borrower Overrides multiple times as needed on the Informed Borrower Override
page (Financial Aid > Loans > Direct Lending Management > Override Loan Application Data > Informed Borrower
Override).

For more information, see "Viewing and Overriding Bio/Demo Data for Direct Lending" in Processing Direct Loans (PeopleSoft Campus Solutions 9.2: Financial Aid).

Recruiting and Admissions

This section describes new functionality or enhancements that apply to Recruiting and Admissions.

(GBR) Apply Application Updates

Apply is replacing the online UCAS application form for postgraduate teacher training. This is the third phase of updates to support the Department for Education (DfE) Apply system for teacher training applications in England ahead of the go-live planned for October 2021.

- Delivered setup pages for Apply Applications to map gender and residency.
 - Gender Mapping page
 - Residency Mapping page
- Setup and transaction pages were updated.
 - New field on the UCAS Configuration page, Apply Setup: Default Decision Maker.
 - Institution Long Name is now required on the Institution page, and imported records that were read-only are now editable.
- The import application process and apply decisions export were updated to process imported fields from Apply Applications.
 - For Apply candidates, SEX is populated with the HESA code value from HESA ITT Data converted using the new Gender mapping record.
 - Biographical information is updated to import these new fields: Disability, Ethnic Code.
 - Reference is updated to import these new fields: Reference ID, Safeguarding Concerns.
 - Qualifications is updated to populate new fields added to the staging records for these attributes: Non-UK
 Qualification Type, Degree Type, Degree Establishment, Degree HECoS code, Degree Classification,
 Degree Country, Degree Start Date, and Degree End Date.
 - Choices is updated to populate Entry Year and Entry Month using the new start_date attribute instead of mapping the values from the Apply Course record based on the recruitment cycle. SAD_UC_CAMPUS is expanded from 3 to 5 characters to handle 5–character site codes.

For information, see (GBR) Managing UCAS and UTT Applications (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions):

- "Setting Up UCAS and Teacher Training Options" in Preparing for UCAS and UTT Data Processing
- Setting Up Elements for Teacher Training Applications
- "Entering or Updating a Decision for Apply Applications" in Processing Imported UCAS and UTT Applications and Applicant Data

Student Records and Academic Advising

This section describes new functionality or enhancements that apply to Student Records.

(GBR) HESA Updates

These updates include:

- Adding the 2021-2022 reporting period, fields, and codes in HESA returns setup.
- Delivering the CAH3 codes, which aren't included in the HESA XSD. If there are any updates to these codes, you will need to manage it. Using the Codes page, you can add new codes, and make obsolete codes inactive. (Records and Enrollment > HESA Reporting > Codes and Mappings > Codes)
- Updates to these HESA pages to add the CAH3 field and description (which are optional): Program HESA Data, Plan HESA Data, and Sub-Plan HESA Data.

For information, see "Entering HESA Data for an Academic Program" in (GBR) Managing HESA Returns (PeopleSoft Campus Solutions 9.2: Student Records).

Program Enrollment and Activity Management Updates

 Updated Activity Management and record views to allow Activity generation without Exam Section. When the Exam Section is not selected at Activity definition, Scheduling Options at Activity Registry, Activity Manager, and WorkCenter are disabled. If Exam Section is selected at the Activity Definition but Schedule Activity at the Activity Registry is not selected, Activities can still be generated in batch.

You can find Scheduling options on the Registry Detail page (Curriculum Management > Activity Management > Activity Registry > Activity Registry > Registry Detail).

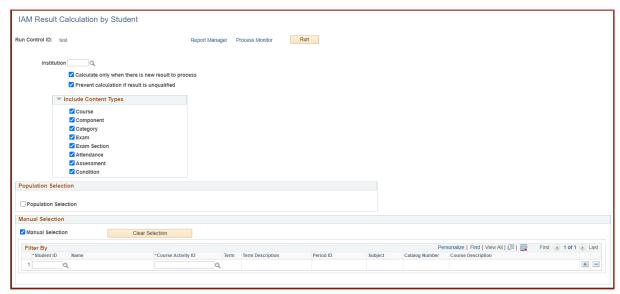
 Updated Activity Management and record views so when Exam Section is turned off, Exam Schedule setup and details aren't used to schedule exams for students.

For more information, see "Setting Up the Activity Registry" in Setting Up Activity Management (PeopleSoft Campus Solutions 9.2: Student Records).

- Added option to Result Calculation process to prevent calculation when unqualified results exist and to calculate
 only when there are new results to process. Result Calculations are found on the IAM Result Calculation page
 (Records and Enrollment > Individual Activity Manager > IAM Result Calculation).
- Provided an option at the institution level to select which Term Begin Date to use when retrieving Academic Item Registry Item and Course descriptions.

For information, see "Defining Academic Institutions" in Designing Your Academic Structure (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

• Added new process page to calculate result on individual student level. Find the new IAM Result Calculation by Student page (Records and Enrollment > Individual Activity Manager > IAM Result Calculation by Student).



IAM Result Calculation by Student page

For more information, see "Managing Course Rosters" in Managing Activities (PeopleSoft Campus Solutions 9.2: Student Records).

(AUS) TCSI Updates

This update supports the Australian government reporting TCSI solution, which merges the existing CART and HEIMS solutions, replacing the existing HEPCAT process with RESTful APIs.

There's a new page to report scholarships to TCSI from 01/01/2019: TCSI Commonwealth Scholarships. The process creates one record for each student record that's reported to TCSI.

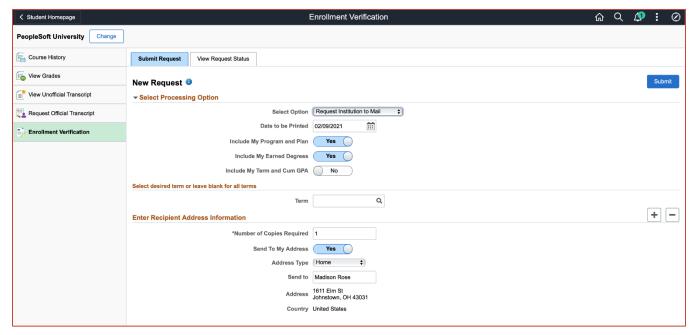


TCSI Commonwealth Scholarships page

For information, see (AUS) Submitting Government Reports using TCSI Web Services on My Oracle Support (Doc ID 2692408.1).

Fluid Request Enrollment Verification

To provide additional Fluid self-service functionality for students, this addresses the need for delivering an end-to-end enrollment verification transaction for the student to request, download, and print an enrollment verification on any device. On the Fluid interface, students can now submit a request to verify enrollment, which they can then view on a web browser and then print. In addition, this feature may increase administrators' productivity by not having to fulfill enrollment verification requests.



Fluid Enrollment Verification page

For information, see:

- "Understanding Delivered Fluid Pages" and "Using the Student Homepage" in Setting Up and Using PeopleSoft Fluid User Interface Home Pages (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
- "Managing Academic Records Using PeopleSoft Fluid User Interface" in Using Self-Service Academic Services (PeopleSoft Campus Solutions 9.2: Self Service)
- "Managing Classes Using PeopleSoft Fluid User Interface" in Using Self-Service Enrollment (PeopleSoft Campus Solutions 9.2: Self Service)

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