Oracle® Student System

User's Guide

Release 11*i*

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Oracle Student System User's Guide, Release 11*i*

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Send Us Your Comments

Oracle Student System User's Guide, Release 11*i*

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the chapter, section, and page number (if available). You can send comments to:

> Oracle Corporation
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If you would like a reply, please give your name, address, and telephone number below.

If you have problems with the software, please contact Oracle Support Services.

Preface

The *Oracle Student System User's Guide* provides information on how to use Oracle Student System.

The following sections are included in this preface:

- Audience for this Guide
- Conventions
- Documentation Accessibility
- Other Information Sources
- Navigation Paths
- Training and Support
- Do Not Use Database Tools to Modify Oracle Applications Data
- About Oracle
- Documentation Sales
- Feedback

Audience for this Guide

Welcome to Release 11*i* of the *Oracle Student System User's Guide.*

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

- Principles and customary practices of the business area
- Oracle Student System

Oracle suggests that users who have never used Oracle Student System attend one or more of the Oracle Student System training classes available through Oracle University.

- 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.

Conventions

The following conventions are observed:

- Conventions
- Usage Conventions
- References

Special Conventions

The following special conventions are observed:

Table 0–1 Special Conventions

bold	Bold type denotes buttons, as in the following example:
	Click **Unit Details** to transfer units.
Titlecase	Titlecase text denotes Oracle keywords and predefined system statuses, as in the following example:
	Confirmed
Note:	Notes alert users to the following type of information in this guide:
	Note: Notes alert users to key points to consider when using a feature.
WARNING:	Warnings alert users to the following type of information in this guide:
	WARNING: Warnings highlight text that warns of actions that could result in loss of data or incorrect processing.

Usage Conventions

The following usage conventions are observed:

Table 0–2   Usage Conventions

Attach file	Indicates that users should click the Attachment icon to attach a document to a record.
	For information on attachments, see About Attachments and Attachments Window, *Oracle Applications User's Guide*.
Save your work	Indicates users should save your work and close the window. To close the window users can either use the **File - Close Form** command or click on the x in the upper right-hand corner.
	Note: The **File - Close Form** command produces different results depending on the product and platform in use. For example, sometimes it closes only one window; at other times, it closes all open windows. Users must familiarize themselves with how the command behaves in their own environments.
Descriptions of Graphics	Textual descriptions accompany all graphics that appear in this guide.
Query appropriate data	Indicates users should query data in the window using **View - Find** or **View - Query By Example - Enter**.
	For information on entering and querying data, see Entering and Querying Data, *Oracle Applications User's Guide*.

References

All references to specific chapters refer to chapters in this guide unless otherwise noted.

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 Corporation 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

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

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

Related User's Guides

Oracle Student System shares business and setup information with other Oracle
Applications products. Users may want to refer to other user's guides when setting
up and using Oracle Student System. "I feel we can include information about the
implementation guide" Yes.

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

Purchase printed guides, if required, 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 available with this release of Oracle Student System and
any other Oracle Applications products. This guide also includes information on
setting user profiles, as well as running and reviewing reports and concurrent
processes.

Access this user's guide by choosing Getting Started with Oracle Applications from any Oracle Applications help file.

User's Guides Related to This Product

This guide contains references to the following Oracle publications:

- *Configuring, Reporting, and System Administration in HRMS*

- *Managing People Using Oracle HRMS*

- *Multiple Organizations in Oracle Applications*

- *Oracle Applications Desktop Integrator User's Guide*

- *Oracle Applications Flexfields Guide*

- *Oracle Applications System Administrator's Guide*

- *Oracle Bill of Materials User's Guide*

- *Oracle CRM Application Foundation Implementation Guide*

- *Oracle CRM Application Foundation Concepts and Procedures*

- *Oracle General Ledger User's Guide*

- *Oracle Inventory User's Guide*

- *Oracle Marketing Online Implementation Guide*

- *Oracle Marketing Online Concepts and Procedures*

- *Oracle Payables User's Guide*

- *Oracle Receivables User's Guide*

- *Oracle Student System Financial Aid User's Guide*

- *Oracle Student System for the United Kingdom User's Guide*

- *Oracle TeleSales Implementation Guide*

- *Oracle TeleSales Concepts and Procedures*

- *Oracle Workflow Guide*

- *Using Oracle HRMS - The Fundamentals*

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 is a useful first book to read before installing 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, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks needed to complete an installation. Use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide when upgrading 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. To upgrade to Release 11*i*, users must be at Release 10.7, in NCA, SmartClient, or character mode, or Release 11.0. Users cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to run various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. The guide contains how-to steps, screenshots, and other information needed 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

The guide provides planning and reference information for the Oracle Applications system administrator. The guide 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 Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface (UI) described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help users build custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

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

Implementation Documentation

Oracle Student System Implementation Guide

The Oracle Student System Implementation Guide describes setup for integrations with other Oracle products and features in addition to providing setup information for Oracle Student System itself. You use this guide for information about setting up your codes, types, profile options, and institution information in Oracle Student System.

Oracle Student System Open Interfaces User's Guide

The *Oracle Student System Open Interfaces User's Guide* provides information on using interface tables to perform the following:

- import data into Oracle Student System

- transfer data within Oracle Student System

- export data from Oracle Student System to another Oracle application or **third-party** software and import the processed data into Oracle Student System

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 manual 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 users convert data from existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on MetaLink.

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with other systems. The guide includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

The manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with other systems. The guide includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. The guide is available in HTML format on the documentation CD-ROM for Release 11*i*.

Navigation Paths

Navigation paths for windows in Oracle Student System are documented for the system as they are shipped. If responsibilities are changed after installation the documented navigation paths may not be correct.

Training and Support

Training

Users have a choice of educational environments. They can attend courses offered by Oracle University at any one of our many Education Centers, or can arrange for our trainers to teach at their facility, or can employ the 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 users' needs. For example, users can employ their own organizational structure, terminology, and data as examples in a customized training session delivered at their own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information needed to keep Oracle Student System working for all users. This team includes the technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in users'

specific business areas, managing an Oracle server, and users' hardware and
software environments.

Do Not Use Database Tools to Modify Oracle Applications Data

**We STRONGLY RECOMMEND that users never use SQL*Plus, Oracle Data
Browser, database triggers, or any other tool to modify Oracle Applications
tables, unless otherwise instructed.**

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

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

When users employ Oracle Applications to modify the data, Oracle Applications
automatically checks that the changes are valid. Oracle Applications also keeps
track of who changes the information. But if users enter information into database
tables using database tools, users can store invalid information. Users also lose the
ability to track who has changed the information because SQL*Plus and other
database tools do not keep a record of changes.

About Oracle

Oracle Corporation 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,
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information resource.

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Thank you for using Oracle Student System and this user's guide.

Oracle values comments and feedback. At the end of this guide is a Reader's Comment Form that users can employ to explain what they like or dislike about Oracle Student System or this user's guide. Mail comments to the following address:

Oracle Student System Documentation Manager

Oracle Corporation

500 Oracle Parkway

Redwood Shores, CA 94065

U.S.A

1

Product Overview

This chapter provides an overview of Oracle Student System. The following sections are in this chapter:

- Overview
- User's Guide
- Setup
- Program Structure and Planning
- Person Reference
- Admissions
- Enrollments
- Student Finance
- Financial Aid
- Academic Records
- Oracle Student System Process Diagram
- Other Products

Overview

Oracle Student System is part of an suite of software modules that provides educational institutions with an integrated system for managing student information. Oracle Student System manages the entire life cycle of a student from inquiry through graduation.

User's Guide

The *Oracle Student System User's Guide* contains information required to perform various tasks in each subsystem.

Each part includes a chapter or chapters that provide an overview of the subsystem functionality.

This guide is divided into the following chapters:

- Program Structure and Planning
- Person Reference
- Admissions
- Enrollments
- Student Finance
- Financial Aid
- Academic Records

Each chapter contains an overview that describes the functionality provided by the subsystem, followed by step-by-step procedures that describes how to use it. Each procedure contains an introduction followed by the following subsections:

- Prerequisites
- Overview
- Responsibility
- Navigation
- Steps
- Guidelines
- See Also

WARNING: Enhancements are added to this product regularly. Information presented here may be superseded by subsequent updates to online help. If there is a discrepancy between product functionality and the online help describing it, ensure that the system administrator has installed the most current updates to online help.

Setup

The Setup subsystem records and maintains information required to implement Student System features and functions.

Institutions can use the profile options to set up Oracle Student System for a career-centric or program-centric approach. If institutions elect to set up Oracle Student System using a career-centric approach, a student is linked to one or more careers, which includes undergraduate, graduate, and professional. Unit attempts are linked to these careers, which may include one or more program attempts.

Setup is described in the *Oracle Student System Implementation Guide*.

Program Structure and Planning

The Program Structure and Planning subsystem is used to manage the details related to an institution's programs, units, unit sets, unit sections, and faculty.

Program Structure and Planning includes the following:

- Program Structure and Planning Overview
- Creating Unit Sections
- Setting Up Faculty Information

Person Reference

The Person subsystem is used to manage the details related to persons entered in Oracle Student System.

Person and organization entities within Oracle Student System use the Trading Community Architecture to enhance the interaction between Oracle Student System and the other e-business suite modules.

Person includes the following sections:

- Person Reference Overview
- Entering Person Details
- Querying Persons
- Managing Duplicate Person Details
- Placing Holds
- Tracking

- Import Process

Admissions

The Admissions subsystem is used to manages an institution's admission processes from recruiting, through inquiry till admission and includes tracking of requirements.

- Overview of the Admissions Process
- Maintaining Recruiting Details
- Managing Inquiries
- Entering Applications
- Maintaining Academic History
- Importing Admission Information
- Processing Applications
- Admitting Students
- Closing Admissions
- Generating Admission Statistics

Enrollments

The Enrollments subsystem is used to manage student enrollment, re-enrollment, and enrollment changes.

Enrollments includes the following sections:

- Enrollments Overview
- Pre-Enrollment
- Timeslots
- Enrollment
- Waitlists
- Post Enrollment
- Transferring Students Between Programs, Units, and Unit Sets
- Setting Up Research Candidacy Details

Financial Aid

The Financial Aid subsystem is used to manage student administration and financial management of higher education.

Financial Aid Management includes the following sections:

- Financial Aid Overview
- Financial Aid Applications
- Verifying Financial Aid Applications
- Need Analysis
- Administering Student Awards
- Administering Student Sponsorships
- Administering Pell Grants
- Administering Loans
- Student Employment
- Disbursements

Student Finance

The Student Finance module is used to manage all the financial transactions and accounting processes that determine student charges and credits for a specific study period in an educational institution.

Student Finance includes the following sections:

- Student Finance
- Processing Deposits
- Calculating Charges and Credits
- Billing
- Working with Holds
- Dealing with Refunds
- Interfacing with General Ledger

Academic Records

The Academic Records subsystem is used to manage and monitor a student's progress through the student's academic program and maintains a record of the student's academic work at the institution or granted through advanced standing.

Academic Records includes the following sections:

- Academic Records Overview
- Evaluating Applications for Advanced Standing
- Assessing a Unit Attempt
- Applying Progression Rules and Outcomes
- Applying Program Completion Rules
- Managing Graduation
- Degree Audit
- Producing Documents

Oracle Student System Process Diagram

Figure 1–1 depicts a high level view of the major processes and flows in Oracle Student System, and shows the major constituents that are served by the system and their primary interactions with these processes as described in Table 1–1and Table 1–2.

Figure 1–1   Oracle Student System Process Diagram
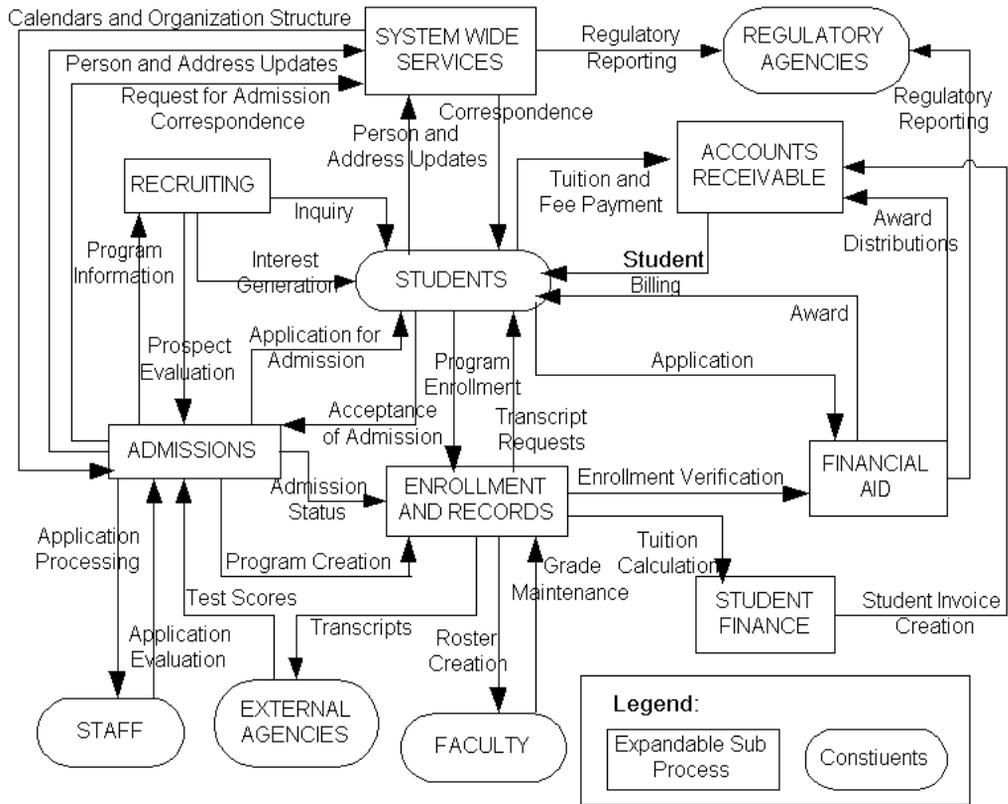
Table 1–1 describes the major processes and some of the constituents or processes that they interact with.

Table 1–1   Major Oracle Student System Processes

Process	Interactions
System Wide Services	Provides calendars and organization structure for all the subsystems in Oracle Student System.
	Receives person and address updates and requests for admission correspondence from Admissions subprocess.
	Receives person and address updates from students.
	Sends correspondence to students.
	Sends regulatory reporting to regulatory agencies.
Recruiting	Provides prospect evaluation for Admissions subprocess.
	Receives program information from Admissions subprocess.
	Generates interest and receives inquiries from prospective students.
Admissions	Sends person and address updates and requests for admission correspondence to System Wide Services subprocess.
	Obtains calendars and organization structure from System Wide Services subprocess.
	Sends program information to Recruiting subprocess.
	Receives prospect evaluations from Recruiting subprocess.
	Sends application processing information to staff.
	Receives application evaluation information from staff.
	Receives test scores from external agencies.
	Receives applications for admission and acceptance of admission from students.
	Sends admission status information to Enrollment and Records subprocess.
	Receives program creation information from Enrollment and Records subprocess.

Table 1–1   Major Oracle Student System Processes

Process	Interactions
Enrollment and Records	Receives admission status from Admissions subprocess.
	Sends program information to Admissions subprocess.
	Receives program enrollment information and transcript requests from students.
	Creates rosters for faculty.
	Receives grade maintenance information from faculty.
	Sends transcripts to external agencies.
	Verifies enrollment for Financial Aid subprocess.
Student Finance	Calculates tuition and fees based on information from Enrollment and Records subprocess.
	Creates student invoices for Accounts Receivable subprocess.
Financial Aid	Receives Financial Aid applications from students.
	Receives enrollment information from Enrollment and Records subprocess.
	Sends award information to students.
	Sends award distributions to Accounts Receivable subprocess.
	Enables regulatory reporting to regulatory agencies.
Accounts Receivable	Receives student invoices from Student Finance subprocess.
	Receives award distribution information from Financial Aid subprocess.
	Sends bills to students.
	Receives tuition and fee payment from students.

Table 1–2 describes the major constituents for Oracle Student System and sample primary interactions with major processes.

Table 1–2   Oracle Student System Constituents

Constituent	Interactions
Students	Receive correspondence from System Wide Services subprocess.
	Send person and address updates to System Wide Services subprocess.
	Receive information from Recruiting subprocess.
	Send inquiries to Recruiting subprocess.
	Send application for admission and acceptance of admission to Admissions subprocess.
	Send program enrollment and transcript requests to Enrollment and Records subprocess.
	Send application to Financial Aid subprocess.
	Receive award from Financial Aid subprocess.
	Receive student billing from Accounts Receivable subprocess.
	Send tuition and fee payment to Accounts Receivable subprocess.
Staff	Receive application processing information from Admissions subprocess.
	Send application evaluation information to Admissions subprocess.
External Agencies	Send test scores to Admissions subprocess.
	Receive transcripts from Enrollment and Records subprocess.
Faculty	Receive roster from Enrollment and Records subprocess.
	Send grade maintenance information to Enrollment and Records subprocess.
Regulatory Agencies	Receive regulatory reporting from System Wide Services subprocess and Financial Aid subprocess.

Other Products

Oracle Student System can be used with the following products:

- Oracle General Ledger
- Oracle Receivables
- Oracle Payables
- Trading Community Architecture
- Oracle Marketing
- TeleSales

2

Program Structure and Planning

Institutions use the Program Structure and Planning subsystem to define programs and program-related data for an academic calendar to be used by the other subsystems in Oracle Student System.

Program Structure and Planning includes the following:

- Program Structure and Planning Overview
- Creating Unit Sections
- Creating Cross-Listed Groups
- Setting Up Faculty Information
- Program Structure and Planning Concurrent Processes
- Program Structure and Planning History

Program Structure and Planning Overview

In Program Structure and Planning subsystem, a program consists of one or more units. Each unit can consists of multiple unit sections. When a unit is defined in terms of attributes, such as academic calendar, location, attendance type, and attendance mode, it becomes a unit section.

This section consists of the following:

- Defining Unit Sections Attributes
- Defining Unit Section Occurrence Attributes
- Assigning Faculty to Unit Sections

Defining Unit Sections Attributes

The unit section attributes are defined at two levels: unit section and unit section occurrence. At the unit section level, the attributes comprise elements that are defined to manage a unit section, such as credit point, grading schema, location, enrollment limit, and assessment items.

At the unit section occurrence level, the attributes defined are specific to resources and time, such as meeting pattern, time, building, classrooms, start and end dates, and instructors.

Figure 2–1 shows the attributes that must be defined at the unit section level.

Figure 2–1   Unit Section Details Attributes
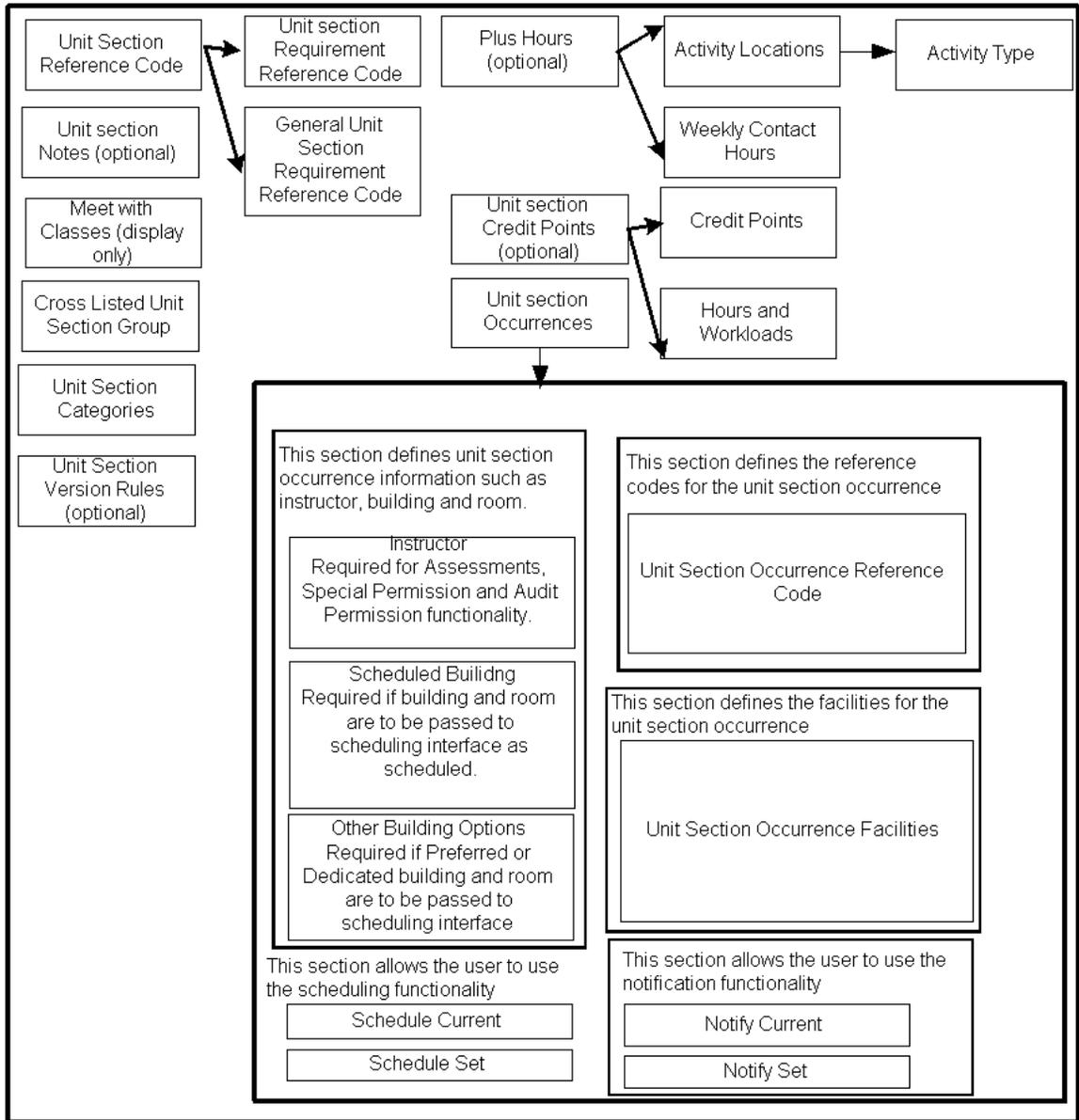
You can begin defining the unit section details by specifying the unit section version rules. Version rules are used to determine conditions that must be met prior to or during enrollment in a unit. You can inquire on the unit version rules attached to a particular unit version or modify the rule for a specific unit section. The unit section version rules comprises the following:

- Unit corequisite rule - checks that another unit defined in the rule must be enrolled in the same time

- Unit prerequisite rule - checks that another unit, defined as a pre-requisite has been completed (in accordance with the rule) prior to enrollment in the subject unit

Institutions may define reference codes by which a unit section is identified by other systems or organizations. For example, an external system namely IVR (for interactive voice response), a system used for telephone inquiries and data entry relating to course and unit enrollments, can use these reference codes for answering telephone inquiries.

Each unit section is attached to a grading schema. A grading schema describes a set of grades, marks, and results available for the assessment of student unit attempts. Multiple grading schemas can exist for an institution. These grading schemas are inherited from the unit section. Users can select only the grading schema setup at the unit level.

Unit sections are also assigned a specific number of students to enroll. If an institution allows waitlisting of students, you need to select the waitlisting option at the institution level to define waitlist controls and validations used during the enrollment process. Waitlists are also defined at the organizational unit level, unit-offering pattern level and inherited at the unit section level, where they can be modified.

Unit sections are assigned a specific number or range of credit point values. You can query, define, and maintain various credit point values for each unit section. Credit point attributes are inherited from the parent unit and can be modified at the unit section level.

A unit section may be repeated under specified conditions that must be defined at the unit level. These conditions determine if a student can repeat a unit section in the same teaching period or in another, the maximum number of repeats a student can attempt, the maximum repeat credit points a student can earn, and the maximum number of repeats eligible for funding. You can also specify unit sections that can be taken as a substitute for repeating the unit section. Such unit sections are called Repeat Family.

Unit section details also include defining assessment information, such as the final exam start and end date, time, location, building, and room. The unit section assessment items procedure defines and maintains assessments specific to each unit section. Unit section assessment items are inherited from the unit level and can be modified for the specific unit section.

Unit sections with similar subject matter can be grouped together into a single entity called cross-listed group. Unit sections within this group share calendar type, and maximum enrollment and override limits. Override limits refer to the number of students that can be enrolled over the maximum enrollment limit. Apart from enrollment limits and override limits, unit sections can also share common buildings, classrooms, and instructors. When a group of two or more unit sections share a common classroom for teaching purposes, such a group is called meet with classes group. If the group shares a classroom for examination purposes, it is called Meet with Exams group.

Institutions can also combine units and unit sections belonging to different organization within an institution to share departments or subjects. This is done using a method called categorization. For instance, a class schedule might contain a subject called Environmental Studies, but the students appearing for this subject might belong to different organizational units such as Biology, Business Administration, or Sociology.

While defining the unit section attributes, you can attach notes to include any specific information about a unit section. Notes can be categorized under note types, such as academic, bulletin, and so on. Also, you can define your own note types.

A huge amount of curriculum data is generated while defining the attributes of unit sections. To reduce the work involved in maintaining such data, a rollover functionary is provided by Oracle Student System. This function enables you to create a new unit section based on existing unit section information, such as location, enrollment limits, and schedules.

In addition to unit sections, you can also roll over unit offering patterns, assessment items, and waitlist attributes in a new calendar instance for one or more organizational units which fall within the same calendar term which is active. Also, the calendar type being rolled over and the new calendar type being created should be of teaching category.

Defining Unit Section Occurrence Attributes

Unit section occurrence level attributes define the location where a unit section can occur and specify the resource, such as buildings and rooms associated with the

occurrence. Some examples of attributes associated with unit section occurrences are dedicated buildings and rooms, preferred buildings and rooms, and the unit section start and end dates if it differs from the teaching calendar.

Buildings and rooms are assigned to a unit section occurrence by a third party software. The information of the unit section such as the dates, day, time, building, and room will be passed to the scheduling interface tables.

Institutions require information about the unscheduled contacts in a unit section for funding purposes. An example of unscheduled contacts list would be the rooms that students or faculty members use. As rooms are not scheduled by date, day, or time, the contact list is considered unscheduled.

Once you have defined the attributes of unit sections, you need to assign faculties to unit sections. This involves assigning tasks, workloads, and non-academic responsibilities to each faculty and entering their educational qualification in Oracle Student System.

Next, assign new tasks and workload to a faculty or override the assigned workload if they conflict with an existing workload. A faculty member's degree information, including degree, program or major, institution attended, and date of graduation must also be specified along with the discipline and unit information for which the faculty member is approved to teach.

You also need to specify the expected workload of a faculty for a particular calendar category. Expected workload can be defined only once. For example, if an institution defines the expected workload for a term calendar, it cannot define an expected workload for an academic year as well.

Assigning Faculty to Unit Sections

Faculty members can also be assigned different types of tasks apart from academic tasks. For example, a faculty member can be assigned the task of a department chairman or a field trip supervisor. You can also specify degree details of each faculty member to record and query specific codes and descriptions for academic degree types, disciplines, units, and record them for faculty members.

In addition, you can configure a faculty's assignment to rollover from one calendar type to another by running a concurrent process. For this, the calendar category for the source and destination calendar types must be the same. You can also define number of times the task can be rolled over.

Most information entered in the Program Structure and Planning subsystem is reference data. The ability to add, modify, and delete this data is restricted to subsystem specialists and system administrators. Apart from the reference data, the

Program Structure and Planning subsystem is also used to enter maintenance data that might be changed and modified at regular intervals, typically each term or at a semiannual basis. Such data can be managed by fee officers or users who use Oracle Student System at a day-to-day basis.

Creating Unit Sections

A unit section is a discrete offering option of a unit, differentiated by location, unit mode, and unit class. Creating a unit section includes the following:

- Specifying Unit Section Details
- Scheduling Unit Sections
- Defining Unit Section Assessment and Assessment Items
- Defining Enrollment limits, Waitlists, and Reserved Seatings

While defining data for unit sections, you can start by creating unit sections, assigning them to grading schemas and then associating unit sections with reference codes and section categories. Next, you can define repeat conditions and assign categories and teaching responsibilities. Teaching responsibilities set at the unit level can be overridden at the unit section level. You also need to create a cross-listed unit section group to assign subjects, buildings and resources to be shared by two or more unit sections. Enrollments and waitlists are also to be defined for individual unit sections or a group. After a unit section is setup, you need to define a schedule and assign credit points for each unit sections.

Specifying Unit Section Details

Unit sections are instances of the associated unit. Unit sections contain many institution-defined elements or attributes necessary for use in Oracle Student System.

Specifying unit section details include attaching rules to unit sections, assigning reference codes, grading schemas, categories to unit sections, defining repeat conditions, and teaching responsibility.

Prerequisites

Organizational unit data must be defined.

Location data to set up buildings and rooms must be defined.

Unit data must be defined to which to attach unit section detail information.

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Unit Section Details - Unit Section Details window

Program Structure and Planning - Basic Unit Details - Find Unit Sections window

Steps

1. In the Basic Unit Details window, enter or query the unit code and click **Unit Offerings**. Select the appropriate unit offering and click **Unit Sections**. Next, click **Unit Section Details** to open the Unit Section Details window.

2. Optionally, in the Find Unit Sections window enter the code and version number of the unit for which you want to enter unit section details and click **Find** to display the Unit Section Details window.

3. Click **Reference** and enter the title and subtitle in the Unit Section Reference Region. Select the reference code type in the Unit Section Requirements Reference Codes tab. Next, enter the reference code in the General Unit Section Reference Codes tab. For information on reference codes, see Program Structure and Planning Overview.

4. In the Unit Sections window, click **Unit Section Grading Schemas** to select the details of grading schema, such as code and description.

5. Click **Unit Section Version Rules** and then click **Edit Rule** to modify the existing rules. Click **Options\Validate** to edit rules text. You need to save the rules inherited or delete the rules not required.

   Note: You must delete the rules not required.

6. Save your work.

7. Click **Repeat Conditions** to indicate conditions under which a unit section may be repeated. Select Re-enroll for credit allowed to indicate that the student is allowed to re-enroll for credit. Enter the maximum number of repeats allowed for credit, maximum repeats refunded, maximum credit points for a repeat, number of times a unit can be repeated in a teaching period, and credit points for repeating the same teaching period. Select Same Teaching Period to indicate that the student is re-enrolling for the same teaching period.

   Note: The same teaching period indicator is currently providing no functionality in Enrollment.

8. In the Unit Section Categorizations window, click **Categories** to specify the category and description for a unit section.

9. Save your work.

10. Run the Unit Section Rollover Exception report concurrent process to rollover the attributes of existing unit sections to new unit sections. This process generates a report indicating the unit sections which failed to rollover. Enter the runtime comment, the date on which the process is run and the organizational unit to which the unit section belongs.

Guidelines

Unit sections are assigned the following institution-defined statuses depending on the student enrolled and waitlisted.

- Open when enrollment is on and the maximum student limit for a unit section is not reached

- Closed when a unit section is not in use anymore. A unit section may be applied the status closed if the maximum enrollment and waitlisting limits are reached

- Full when the maximum number of students to be enrolled in a unit section is reached

- Accepting waitlisting when wailisted students are being accepted for a unit section

- Cancelled when unit sections are cancelled

- Planned when a unit section is not currently in use but scheduled to be used at a later date

- Hold when a student is dropped from a unit section and another student is enrolled from the waitlist

You need to manually update the unit section status if changes are made to the maximum students per waitlist and maximum enrollment list.

See Also

For general information on the Program Structure and Planning, see Program Structure and Planning Overview.

Scheduling Unit Sections

You can schedule the time and allocate buildings and classrooms to cross-listed groups or individual unit sections. You also need to define the unit section occurrence attributes, such as meeting patterns, time, buildings, rooms, start and end dates, and instructors. Scheduling can be done for meet with classes and cross-listed unit section groups as well.

In addition, you must define the meeting pattern for a group of unit sections. A meeting pattern refers to the time and venue. After you define the dates, day and time, and building and room information, you must run a concurrent job to pass the information to the interface table. The third party vendor software will pull these data from the interface table and perform scheduling. After the scheduling is completed by the third party software, the data must be put back to the interface table, from where Oracle Student System imports data into the system.

Prerequisites

Organizational unit data must be defined.

Location data to set up buildings and rooms must be defined.

Instructor information must be defined.

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Unit Section - Find Unit Sections - Unit Section Details window

Program Structure and Planning - Meet with Exam Group - Meet with Exam Group window

Program Structure and Planning - Meet with Classes Group - Meet with Classes Group window

Program Structure and Planning - Unit Section -Teaching Overrides - Teaching Overrides window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

    - Export Setup Data for Scheduler

    - Get Scheduled Interface Data

- Initiate Scheduling of Unit Section Occurrences

- Purge Scheduling Interface Data

- Schedule Rollover

Steps

1. To assign an instructor to a unit section, enter or query the unit section name and click **Occurrences** in the Unit Section Details window.

2. In the Unit Section Occurrences window, click **Instructors** in the Unit Section Occurrences tab to assign the instructor's ID in the Instructors window.

3. Save your work.

4. To associate a building with unit sections, click **Scheduled Building** and enter the building name and ID in the Scheduled Building window.

5. Click **Other Building Option** to specify dedicated and preferred buildings and rooms in the Other Building Options window.

   Note: You can either enter schedule building information or Other building information but not both.

6. Click **Facilities** and enter the details of the facility code and description in the Unit Section Occurrence Facilities window to allocate facilities, such as computers, projectors, and other stationary items.

7. In the Unit Section Teaching Responsibility window, click **Teaching Responsibility** and view the name and ID of the lead instructor responsible for that unit section. The total work load of a lead instructor for a unit section must total to 100%. Enter the name of the organizational unit sponsoring the unit section and the percentage sponsored in the Sponsorship tab.

   Note: You need to enter the instructor name and ID in the Unit Sections Occurrences window to view the details in the Unit Section Teaching Responsibility window.

8. To override teaching responsibility at the unit section level, enter or query the appropriate unit code in the Teaching Responsibility Overrides window. In the Teaching Responsibility Overrides region, specify the unit attached with the unit section for which you want to override and then specify the override percentage.

9. Save your work.

10. In the Unit Section Meet with Classes Group, enter the group name, the maximum number of unit sections to be enrolled within the group, and the number by which the maximum enrollment limit can be overridden.

11. Save you work.

12. Run the Export Setup Data for Scheduler concurrent process to produce a text file containing information about buildings, rooms and locations. This data is used by non-Oracle software for creating schedules.

    For information on running a concurrent process, see Concurrent Process Procedure.

13. Run the Initiate Scheduling of Unit Section Occurrences concurrent process to pass scheduling data to third party scheduling software. Enter the teaching period and the schedule type.

14. Run the Get Scheduled Interface Data concurrent process to retrieve data from the interface table and pass the data to Oracle Student System to update the information on class, buildings, and locations.

15. Run the Purge Scheduling Interface Data concurrent process to remove data from the interface table. Enter the teaching for which data needs to be purged.

    Note: Currently you can only purge past teaching calendar.

16. Run the Schedule Rollover concurrent process to define and schedule the rollover of schedule definitions and notes.

See Also

For general information, see Program Structure and Planning Overview.

For general information on cross-listed groups and attributes, see Creating Cross-Listed Groups.

Defining Unit Section Assessment and Assessment Items

The unit section assessment defines and maintains information about a unit section's final examination, such as date, start and end times, location, building, and room.

The unit section assessment items define and maintain assessments specific to each unit section. Unit section assessment items are inherited from the unit level and can be modified for the specific unit section. Also, each unit section is assigned a specific number or range of credit point values.

Prerequisites

Assessment calendar must be configured with the assessment item variation cutoff date alias, grade or marks submission start and end date aliases

Grading schema must be defined. Mark and grade entry must be configured

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Unit Section - Unit Section Details window

Program Structure and Planning - Unit Section - Find Unit Sections -Unit Section Details- Unit Section Credit Points window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Rollover Unit Offering Pattern and Unit Section

Steps

1. To define unit section assessment, query or enter the unit section name and **Assessment** in the Unit Section Details window. Enter the final exam date, start and end time, and the location the examination is to be held.

   Note: This information is only for storage purposes.

2. Click **Assessments Items** to specify the assessment items in the Unit Section Assessment Items window. Select the assessment ID and the grading schema.

3. Save your work.

4. In the Unit Section Details window, click **Credit Points**. Enter the lecture, other, and laboratory credit points in the Credit Points tab to specify the credit points for a unit section. Select Exclude From Max Credit Point Limit to indicate that the maximum credit point for a unit section can cross the normal maximum credit points limit.

   Note: Credit point attributes are inherited from the parent unit and can be modified at the unit section level. You can insert, update, and delete all the credit points except for enrolled credit points and achievable credit points.

5. Enter the hour and workload breakup details in the Hours and Workload tab.

6. Save your work.

7. To rollover unit offering pattern and unit sections, run the Rollover Unit Offering Pattern and Unit Section concurrent process. Enter the source calendar to be rolled over, destination calendar to receive rolled over data, and the organizational unit that offers the program.

Guidelines

You can select Include Deleted Items to have assessment items created earlier to appear in the Assessment Item ID list. You can also select the appropriate check boxes to specify if the assessment type is scheduled, or a default assessment pattern or non-default assessment pattern. However, you can make these choices only if they were included while defining assessments and assessment patterns for a unit section.

The Rollover Unit Offering Pattern and Unit Section concurrent process is run in batch mode by a program structure and planning specialist as needed while setting curriculum for a new teaching period.

See Also

For general information on Program Structure and Planning, see Program Structure and Planning Overview.

For general information on the Assessment, Assessment Items and Credit Points, Chapter 5, Enrollments, see Attaching Assessment Items and Patterns.

Defining Enrollment limits, Waitlists, and Reserved Seatings

Waitlisting can be defined at institutional level, organizational unit level, the unit offering pattern, and at unit section levels and is inherited from unit offering to unit sections. Enrollment limit and reserved seating are defined for units and inherited from units to unit sections.

The unit section enrollment limits and waitlist procedure determines details related to enrollment and waitlist controls and validations which are used during the enrollment process.

Prerequisites

Enrollment limits must be defined

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Unit Section Details - Unit Section Enrollments Limits, Waitlist and Reserved Seating window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Delete Reserved Seating Priorities

Steps

1. In the Unit Section Enrollments Limits, Waitlist and Reserved Seating window, specify the priority and preference for reserved seating and the preference value percentage in the Reserved Seating tab.

   Note: The reserved seating priority and preference indicates which students have higher priority for enrolling when unit or unit section spaces become available. You can identify priorities based on student attributes, such as program, unit set, program stage, organizational unit, or by a default date and time of the enrollment attempt.

2. Enter the enrollment and waitlist values in the Enrollment Waitlist tab.

3. Save your work.

4. Enter the minimum and maximum enrollment number, number of expected enrollment and the override enrollment limit to set the enrollment limits.

   Note: The override enrollment limit cannot be less then maximum enrollment limit.

5. Run the Delete Reserved Seating Priorities concurrent process to delete all priorities for unit sections in the teaching period. Enter the teaching period, organizational unit, code, version number, location code, unit class, and unit mode.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: To run the process, you must specify either the organizational unit or unit code. Running this process disables the Reserved Seating Allowed check box in the Unit Section Enrollment Limits, Waitlist, and Reserved Seating window.

Guidelines

While running the Delete Reserved Seating Priorities concurrent process, you can set options to delete reserved seating either for all units offered by an organization or a specify organizational unit irrespective of the organization to which it belongs.

See Also

For general information, see Program Structure and Planning Overview.

Creating Cross-Listed Groups

Cross-listed groups consists of multiple units or unit sections which share common attributes. Cross-listed groups can be defined both at unit and unit section levels.

Units within a cross-listed units group share common attributes, such as maximum enrollment and group override limits. In addition, cross-listed unit groups also share common inheritance parameters, such as calendar type, alternate code, start and end dates and location.

Unit sections within a cross-listed unit sections group also share common enrollment and group override limits but they do not contain inheritance parameters at the unit section level. All unit sections inherit the parent unit's inheritance parameters.

In addition to cross-listed groups, you can also group unit sections to share common location and time for examination purposes. For example, if two or more unit sections share the same timetable and location, they can be grouped together as a meet with exam groups. Similarly, if two or more unit sections share the common subjects, they are grouped into meet with classes group. For example, 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.

The meet with exams group and meet with classes group do not share the common attributes with cross-listed unit sections. You need to define the attributes for meet with exams groups and meet with classes groups separately.

Prerequisites

Unit data must be defined

Location data, such as buildings and rooms must be defined

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Meet With/Cross-Listed Groups - Cross-Listed Units Groups - Cross-Listed Units Groups window

Steps

1. To create cross-listed unit groups, enter the name and the maximum enrollment and group override limits in the Cross-Listed Units Group window.

2. Enter the unit names and select the parent unit for the group in the Cross-Listed Units region, and click **Inheritance** to define inheritance parameters.

   Note: You cannot define a cross-listed units groups without specifying the parent unit. Enrollment will not consist the unit to be cross-listed unless it has been inherited down to the unit section level.

3. In the Inheritance Parameter window, specify the calendar type and location and click **Submit**.

   Note: Inheritance is to create cross listed unit sections group with the cross listed unit group information. You cannot make a cross-listed units group inherit to the unit section level if there are no unit sections for that cross-listed units of this group or if cross-listed units have already been used in other unit section level cross-listed groups.

4. To create cross-listed unit sections groups, enter or query the name of the cross-listed unit section group, specify the maximum enrollments for all the units under the group, and alternate code in the Cross-Listed Unit Section Groups window.

5. In the Cross-Listed Unit Sections region, specify the unit section and the maximum number of enrollment allowed for that unit section is displayed automatically. Select Parent to indicate if the unit section is parent of the cross-listed group.

   Note: Only one parent can be selected for each cross listed unit section group. A parent unit section cannot be deleted unless some other unit section is made the parent.

6. Save your work.

7. To group together unit sections into exam groups, enter or query the exam group name and the calendar type in the Meet With Exams Group window. Next, enter or query the unit section assessment name and specify the maximum allowable number in the group in the Meet with Unit Section Assessment region. Select Hold to specify the unit section as the host for the exam group.

8. Enter the unit section assessments and specify the maximum enrollment limit for the group. Select Host to specify an assessment as the host assessment category.

9. Save your work.

Guidelines

All unit sections within a unit inherit the same parameters. You can create a unit sections group containing unit sections from different units.

See Also

For general information, see Program Structure and Planning Overview.

Setting Up Faculty Information

Assigning a faculty to unit section involves assigning tasks, workloads, and non-academic responsibilities to each faculty and entering their educational qualification in Oracle Student System. Before you start assigning the faculties, you can view the existing faculties assigned to a unit section. Next, you can create faculty details if you are assigning a new faculty or reassign an existing faculty to a unit section. Faculties need to be assigned workloads based on the load and academic calendar categories.

Faculty calendars can be rolled over by running a concurrent process. Also, you can override workload assignments for a faculty if they happen to clash. You can override such workload manually and specify the reason for the override. Next, you need to specify the faculty task type and its description, degree code, and then run another concurrent process to check for any conflicting time allotments. You can resolve conflicting time allotments by reassigning faculty workload or by overriding them.

Prerequisites

Calendar Type and Calendar Category must be defined

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Faculty - Assign/Override Faculty's Workload - Assign/Override Faculty's Workload window

Program Structure and Planning - Faculty - Faculty Degree Details - Faculty - Faculty Degree Details window

Program Structure and Planning - Faculty - Expected Workload - Expected Workload window

Program Structure and Planning - Faculty - Override Expected Workload Reasons - Expected Workload Override Reasons window

Program Structure and Planning - Faculty - Faculty Task Types - Faculty Task Types window

Program Structure and Planning - Faculty - Degree Codes - Degree Codes window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

  - Rollover Faculty's Assignment concurrent process

  - Instructor Time Conflict Report concurrent process

Steps

1. To assign workload to a faculty, enter or query the person number, calendar category, and calendar type in the Assign/Override Faculty's Workload. In the Assign Tasks tab, enter the task, department budget code and number of rollover workload. In the Override Expected Workload tab, enter the start and end date, new expected workload, and the reason for the override.

   Note: To view the faculties already assigned to a unit section, access the Faculty Unit section History window.

2. To maintain faculty degree details, enter or query the name of the faculty member and enter the degree, program, institution and date in the Degree tab. Next, enter the discipline code and the description in the Discipline tab and the unit code and description in the Unit tab.

3. Save your work.

4. To specify the minimum expected workload attached to a calendar category for a faculty, enter the calendar category and expected workload in the Expected Workload window.

5. Run the Rollover Faculty's Assignment concurrent process to rollover of faculty assignment from one calendar to the next. The number of times the task can be rolled over depends on the rollover period defined in Assign/Override Faculty's Workload window. The process is run for specified person number or for all applicable person numbers. Enter the instructor's identification number, calendar type from which workload originates, and calendar type to which workload is applied.

For information on running a concurrent process, see Concurrent Process Procedure.

6. To specify the reason for overriding expected workload for a faculty, enter the override reason and the description in the Expected Workload Override Reasons window.

7. To specify the faculty task type, enter task type, its description, department budget code and default workload in the Faculty Task Types window. Default workload refers to the default workload assigned to a task type and department budget code to code assigned to a task type.

8. Save your work.

9. To specify the degree code, enter the degree code and its description in the Degree Code window.

10. Run the Instructor Time Conflict Report concurrent process to check for any time conflict in an instructor's scheduled workload. Enter the runtime comment that appears on header page of report, academic term for which the report will be run, and the instructor's name.

Guidelines

As an example of the number of times a task is to be rolled over; if an institution has two terms, spring and fall, and needs to roll over a task from spring 2003 to spring 2004, the rollover period number is 2.

See Also

For general information, see Program Structure and Planning Overview.

Program Structure and Planning Concurrent Processes

The Program Structure and Planning concurrent processes procedures represent basic rollover processes and summary reports related to programs, units, unit sections, unit sets, catalogs, schedules, and their attributes.

The Program Structure and Planning concurrent processes are intended to be run infrequently, for example, monthly or annually, rather than daily or weekly, for the purposes of creating new teaching period details or monitoring current details. Users supplement these reports with institution-designed, user-specific reports through Oracle Discoverer or Oracle Reports.

The Program Structure and Planning concurrent processes consist of the following:

Prerequisites

Catalogs must be defined for running the catalog rollover concurrent process

Programs must be defined for running the program data report and the program listing report concurrent processes

Units and Unit versions must be defined for running the unit version creation report and unit listing report concurrent processes

Unit sections must be defined for running the Rollover Unit Offering Pattern and Unit Section Concurrent Process

Faculty must be assigned to unit section for running the Instructor time conflict report

Schedules must be defined for running the Schedule Rollover concurrent concurrent process

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Catalog Rollover Concurrent Process

- Delete Reserved Seating Priorities Concurrent Process

- Export Setup Data for Scheduler Concurrent Process

- Get Scheduled Interface Data Concurrent Process

- Initiate Scheduling of Unit Section Occurrences Concurrent Process

- Instructor Time Conflict Report

- Program Data Report--Basic Concurrent Process

- Program Listing Report

- Program Structure and Planning Concurrent Process

- Purge Scheduling Interface Data Concurrent Process

- Review of Unit Version Creation Report

- Rollover Faculty's Assignment Concurrent Process

- Rollover Program Offering Pattern Concurrent Process

- Rollover Unit Offering Pattern and Unit Section Concurrent Process

- Schedule Rollover Concurrent Process

- Unit Data Report--Basic Concurrent Process

- Unit Listing Report Concurrent Process

- Update Last Enrolled and Offered Calendar for Units Concurrent Process

Steps

1. In the Submit a New Request window, select the Single Request radio button and click **Ok**. This displays the Submit Request window.

2. To search for a concurrent process, enter% in the name field and click **Ok**. This displays the list of concurrent processes within Oracle Student System.

3. Select the appropriate concurrent process from the list and click **Ok.** This displays the Parameters window.

4. Enter data in appropriate fields. For information on parameters, see the tables in this chapter.

5. To apply the parameters, click **Ok**.

6. To send the request to the concurrent manager, click **Submit**. This displays the Request window.

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.

9. Close the window.

Catalog Rollover Concurrent Process

Run the Catalog Rollover concurrent process to define and schedule the rollover of catalog definitions and notes from a previous academic calendar.

Table 2–1 describes the Catalog Rollover concurrent process parameters.

Table 2–1   Catalog Rollover Concurrent Process Parameters

Parameter	Description
Existing Catalog Version	Existing catalog version
New Catalog Version	New catalog version
Override Flag	If selected, overrides the existing catalog settings
Debug Flag	If selected, creates an error log file

Delete Reserved Seating Priorities Concurrent Process

Run the Delete Reserved Seating Priorities concurrent process to delete all priorities for unit sections in the teaching period.

Users can set options to delete reserved seating as follows:

- to delete reserved seating for all units offered by an organization, specify organizational unit

- to delete reserved seating for specific units offered by an organization, specify organizational unit and unit

- to delete reserved seating for units irrespective of organization, specify unit only

Note: To run the process, users must specify either the organizational unit or unit code. Running this process disables the Reserved Seating Allowed check box in the Unit Section Enrollment Limits, Waitlist, and Reserved Seating window. See, Defining Enrollment limits, Waitlists, and Reserved Seatings.

Table 2–2 describes the Delete Reserved Seating Priorities concurrent process parameters.

Table 2–2   Delete Reserved Seating Priorities Concurrent Process Parameters

Parameter	Description
Teaching Period	Teaching period for which you want to delete reserved seating priorities. Example of teaching periods can be 10-Feb-2003 - 30 - July - 2003
Organizational Unit	Organizational unit for which you want to delete the reserved seating priorities.
Unit Code	the unique code attached to a unit. For example, 1 Research Unit for Pre Enrollment
Version Number	Unit version number
Location Code	Unit-specific location code
Unit Class	High level time marker or section number; for example, Day, Evening, A1
Unit Mode	Means by which unit can be studied; on campus, off campus

Export Setup Data for Scheduler Concurrent Process

Run the Export Setup Data for Scheduler concurrent process to produce a text file containing information about buildings, rooms, and locations. This data is used by non-Oracle software for creating schedules.

Table 2–3 describes the Export Setup Data for Scheduler concurrent process parameter.

Table 2–3   Export Setup Data for Scheduler Concurrent Process Parameters

Parameter	Description
Column Separator	Column separator

Get Scheduled Interface Data Concurrent Process

Run the Get Scheduled Interface Data concurrent process to retrieve data from the interface table and to pass the data to Oracle Student System to update class information. See, Scheduling Unit Sections.

There are no parameters for the Get Scheduled Interface Data concurrent process.

Initiate Scheduling of Unit Section Occurrences Concurrent Process

Run the Initiate Scheduling of Unit Section Occurrences concurrent process to pass scheduling data to third party scheduling software. See, Scheduling Unit Sections.

Table 2–4 describes the Initiate Scheduling of Unit Section Occurrences concurrent process parameters.

Table 2–4   Initiate Scheduling of Unit Section Occurrences Concurrent Process Parameters

Parameter	Description
Teaching Period	Institution-defined teaching calendar
Schedule Type	Schedule active and unscheduled unit section occurrences; reschedule unit section occurrences; cancel scheduled unit section occurrences

Instructor Time Conflict Report

Run the Instructor Time Conflict Report to check for any time conflicts in an instructor's scheduled workload.

Table 2–5 describes the Instructor Time Conflict Report parameters.

Table 2–5   Instructor Time Conflict Report Parameters

Parameter	Description
Runtime Comment	Comment that appears on header page of report
Term	Academic term for which report is to be run
Instructor Name	Instructor's name

Program Data Report--Basic Concurrent Process

Run the Program Data Report--Basic concurrent process to view the details of all the existing programs in Oracle Student System. You can run this concurrent process before creating new programs. The Program Data Report--Basic concurrent is run on an annual basis.

Table 2–6 describes the Program Data Report--Basic concurrent process parameters.

Table 2–6   Program Data Report--Basic Concurrent Process Parameters

Parameter	Description
Runtime Comment	Comment that appears on header page of report
Academic Calendar Instance	Academic calendar instance
Organizational Unit Member Type	Member type to which organizational unit belongs; external organization, internal organization, professional school
Responsible Organizational Unit	Organizational unit responsible for program version or unit set
Program Status1, 2, 3	Specifies the status of activity or availability of program version
Program Type	Institution-defined classification of higher education programs
Location	Campus, study center, or other place where an institution conducts business or holds classes
Attendance Mode	Program mode of attendance; on campus, off campus
Attendance Type	Describes whether student is full-time or part-time, based on study load
Owning Organizational Unit	Organizational unit which owns maximum responsibility for the program version
Sort By	Sort order of program versions; sort by organizational unit code, program code, program version number

Program Listing Report

Run the Program Listing Report concurrent process to view the list of existing program versions and their statuses.

Table 2–7 describes the Program Listing Report parameters.

Table 2–7   Program Listing Report Parameters

Parameter	Description
Runtime Comment	Comment that appears on header page of report
Academic Calendar Instance	Academic calendar instance
Responsible Organizational Unit	Organizational unit responsible for program version or unit set
Owning Organizational Unit	Organizational unit which owns maximum responsibility for the program version
Organizational Unit Member Type	Member type to which organizational unit belongs; external organization, internal organization, professional school
Program Status	Specifies status of activity or availability of program version
Location	Campus, study center, or other place where an institution conducts business or holds classes
Attendance Mode	Program mode of attendance; on campus, off campus
Attendance Type	Describes whether student is full-time or part-time, based on study load
Sort By	Sort order of program versions; sort by organizational unit code, program code, program version number, program status

Program Structure and Planning Concurrent Process

Run the Program Structure and Planning concurrent process to produce a detailed report compiling old program codes and versions and new program codes and versions.

Table 2–8 describes the Program Structure and Planning concurrent process parameters.

Table 2–8   Program Structure and Planning Concurrent Process Parameters

Parameter	Description
Runtime Comment	Comment that appears on header page of report
Old Program Code	Old program code
Old Program Version	Old program version

Table 2–8   Program Structure and Planning Concurrent Process Parameters

Parameter	Description
New Program Code	New program code
New Program Version	New program version

Purge Scheduling Interface Data Concurrent Process

Run the Purge Scheduling Interface Data concurrent process to remove data from the interface table.

Table 2–9 describes the Purge Scheduling Interface Data concurrent process parameter.

Table 2–9   Purge Scheduling Interface Data Concurrent Process Parameters

Parameter	Description
Teaching Period	Institution-defined teaching calendar

Review of Unit Version Creation Report

Run the Review of Unit Version Creation Report to list unit version details that are not copied to a new unit version from an old unit version. Review of Unit Version Creation Report is generated automatically if the system cannot copy all details to a new unit version from an existing unit version.

Table 2–10 describes the Review of Unit Version Creation Report parameters.

Table 2–10   Review of Unit Version Creation Report Parameters

Parameter	Description
Runtime Comment	Comment that appears on header page of report
Old Unit Code	Old unit code
Old Version Number	Old version number
New Unit Code	New unit code
New Version Number	New version number

Rollover Faculty's Assignment Concurrent Process

Run the Rollover Faculty's Assignment concurrent process to enable rollover of faculty assignments from one calendar type to another. The calendar category for the source and destination calendar types must be the same. The number of times the task can be rolled over depends on the rollover period defined in Assign/Override Faculty's Workload window. The process is run for specified person number or for all applicable person numbers.

Table 2–11 describes the Rollover Faculty's Assignment parameters.

Table 2–11   Rollover Faculty's Assignment Concurrent Process Parameters

Parameter	Description
Person Number	Instructor's identification number
Source Calendar Type	Calendar type from which workload originates
Destination Calendar Type	Calendar type to which workload is applied

Rollover Program Offering Pattern Concurrent Process

Run the Rollover Program Offering Pattern concurrent process to create program offering patterns for an institution or a specified organizational unit in a new calendar instance if the destination calendar exists and is active, and the source calendar type and the destination calendar type are Academic. Only active calendars of the Academic calendar type appear in the list of values.

Table 2–12 describes the Rollover Program Offering Pattern concurrent process parameters.

Table 2–12   Rollover Program Offering Pattern Concurrent Process Parameters

Parameter	Description
Source Calendar	Source calendar to be rolled over
Destination Calendar	Destination calendar to receive rolled over data
Organizational Unit	Organizational unit that offers program

If program offering patterns are already rolled over to the same destination calendar in the Program Offerings window, they are not overwritten.

The Rollover Program Offering Pattern concurrent process is run in batch mode by a Program Structure and Planning specialist as needed while setting curriculum offerings for a new academic year. A new offering pattern must be created in the Basic Program Details window.

Rollover Unit Offering Pattern and Unit Section Concurrent Process

Run the Rollover Unit Offering Pattern and Unit Section concurrent process to create unit offering patterns, unit sections, assessment items, and waitlist attributes in a new calendar instance for one or more organizational units if the destination calendar exists and is active, and the source calendar type and the destination calendar type are Teaching.

Table 2–13 describes the Rollover Unit Offering Pattern and Unit Section concurrent process parameters.

Table 2–13   Rollover Unit Offering Pattern and Unit Section Concurrent Process Parameters

Parameter	Description
Source Calendar	Source calendar to be rolled over
Destination Calendar	Destination calendar to receive rolled over data
Organizational Unit	Organizational unit that offers the program

If unit sections and unit offering patterns are already rolled over to the same destination calendar in the Unit Offerings window, they are not overwritten, but merge with the patterns and options created by this concurrent process. The data that is rolled over into a new unit offering pattern is listed in the Program Unit Rollover Processes report.

The Rollover Unit Offering Pattern and Unit Section concurrent process is run in batch mode by a Program Structure and Planning specialist as needed while setting curriculum for a new teaching period. A new version of a unit must be created in the Basic Unit Details window.

Schedule Rollover Concurrent Process

Run the Schedule Rollover concurrent process to define and schedule the rollover of schedule definitions and notes.

Table 2–14 describes the Schedule Rollover concurrent process parameters.

Table 2–14   Schedule Rollover Concurrent Process Parameters

Parameter	Description
Existing Schedule Version	Existing schedule version
New Schedule Version	New schedule version
Override Flag	If selected, overrides the existing catalog settings
Debug Flag	If selected, creates an error log file

Unit Data Report--Basic Concurrent Process

Run the Unit Data Report--Basic concurrent process to generate reports on existing units and to check details on an annual basis. You need to run this concurrent process before creating new units. Enter the following details to generate unit data report.

Table 2–15 describes the Unit Data Report--Basic concurrent process parameters.

Table 2–15   Unit Data Report--Basic Concurrent Process Parameters

Parameter	Description
Runtime Comment	Comment that appears on header page of report
Academic Period	Academic period
Organizational Unit Member Type	Member type to which organizational unit belongs; external organization, internal organization, professional school
Owning Organizational Unit	Organizational unit which owns maximum responsibility for the unit version
Unit Version Status1	Unit version status1
Unit Version Status2	Unit version status2
Unit Version Status3	Unit version status3
Unit Level	Level of unit in normal year
Location	Campus, study center, or other place where an institution conducts business or holds classes
Unit Class	High level time marker or section number; for example, Day, Evening, A1

Table 2–15   Unit Data Report--Basic Concurrent Process Parameters

Parameter	Description
Unit Mode	Mode by which unit can be studied; on campus, off campus
Teaching Organizational Unit	Teaching organizational unit
Sort1	First sort order of unit versions; sort by unit code or unit status
Order1	Order1; ascending or descending
Sort2	Second sort order of unit versions; sort by unit code or unit status
Order2	Order2; ascending or descending

Unit Listing Report Concurrent Process

Run the Unit Listing Report concurrent process to generate a list of unit versions for a specified academic calendar. Enter the following details to generate the list.

Table 2–16   Unit Listing Report Concurrent Process Parameters

Parameter	Description
Runtime Comment	Comment that appears on header page of report
Academic Calendar	Twelve-month period representing cycle of academic activities
Owning Organizational Unit	Organizational unit which owns maximum responsibility for the unit version
Organizational Unit Member Type	Member type to which organizational unit belongs; external organization, internal organization, professional school
Unit Version Status1	Unit version status 1; active, inactive, or planned
Unit Version Status2	Unit version status 2; active, inactive, or planned
Unit Version Status3	Unit version status 3; active, inactive, or planned
Unit Level	Level of unit in normal year; doctoral study, masters study
Location	Campus, study center, or other place where an institution conducts business or holds classes
Unit Class	High level time marker or section number; for example, Day, Evening, A1
Unit Mode	Mode by which unit can be studied; on campus, off campus

Table 2–16   Unit Listing Report Concurrent Process Parameters

Parameter	Description
Teaching Calendar	Teaching calendar
Teaching Organizational Unit	Teaching organizational unit
Sort1	First sort order of unit versions; sort by unit code or unit status
Order1	Order1; ascending or descending
Sort2	Second sort order of unit versions; sort by unit code or unit status
Order2	Order2; ascending or descending

Update Last Enrolled and Offered Calendar for Units Concurrent Process

Run the Update Last Enrolled and Offered Calendar for Units concurrent process to calculate the last calendar enrolled and the last calendar offered. The process provides a history of the teaching period spanning the load calendar.

Table 2–17 describes the Update Last Enrolled and Offered Calendar for Units concurrent process parameters.

Table 2–17   Update Last Enrolled and Offered Calendar for Units Concurrent Process Parameters

Parameter	Description
Load Calendar	Load calendar up to which update process is run

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. The user who initiates the change is stored along with the detail of the changes.

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

- Teaching Responsibility

- Funding Source Restriction

- Unit Internal Program Level

- Unit Reference Code

- Unit Version

- Unit Set

- Funding Source

Prerequisites

Users 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.

Program Type

Requests - Program Structure History - Program Type - Program Type History window

The Program Type History window displays the history of changes 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.

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 to a field of study.

Program Ownership

Requests - Program Structure History - Program Ownership - Program Ownership History window

The Program Ownership History window displays the changes 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.

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 to the reference codes for a particular program version.

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 to the program unit level for a particular unit version.

Program Version

Requests - Program Structure History - Program Version - Program Version History window

The Program Version History window displays the history of changes 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.

Discipline

Requests - Program Structure History - Discipline - Discipline History window

The Discipline History window displays the history of changes to a discipline group code.

Field of Study

Requests - Program Structure History - Field of Study - Field of Study History window

The Field of Study History window displays the changes to a field of study. A query can retrieve all fields of study.

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.

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 to a teaching responsibility override for a particular unit offering option.

Teaching Responsibility

Requests - Program Structure History - Teaching Responsibility - Teaching Responsibility window

The Teaching Responsibility History window displays the history of changes to the teaching responsibility for a particular unit version.

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 to the funding source restriction for a particular program version.

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 to a unit internal program level code.

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 to the reference code for a particular unit version.

Unit Version

Requests - Program Structure History - Unit Version - Unit Version History window

The Unit Version History window displays the history of changes 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.

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.

Funding Source

Requests - Program Structure History - Funding Source - Funding Source History window

The Funding Source History window displays the history of changes for a funding source.

3

Person Reference

The Person reference subsystem maintains person records. Person records are used in admissions, enrollments, student finance, financial aid, and academic records.

Person Reference includes the following:

- Person Reference Overview
- Configuring Window Layout
- Person Details
- Entering Person International Details
- Creating Person ID Groups
- Applying and Releasing Holds
- Tracking

Person Reference Overview

Institutions create person records in the person subsystem that are used across other subsystems in Oracle Student System.

Maintaining person records involves:

- Person Details
- Person International Details
- Person ID Groups
- Holds
- Tracking

Person Details

Person details recorded by institutions include general information required about persons affiliated to the institution such as prospective students, applicants, students, administrators, staff, and faculty. The residency class and status of the person is used as a basis for granting financial aid and to calculate fee for a student. Housing status applies to enrolled students. It indicates where the person has been residing during a teaching period. A person's academic honor details can be recorded in the person subsystem. These can be used at the time of admission inquiry, or during application processing. Person health and insurance details are recorded. Persons with disabilities may have special needs and require aids, so institutions can record these special needs. The various relationships that a person may have with people within an organization and with an organization are recorded. Institutions can maintain information related to person's felony, the nature and date of the crime, and if a person is convicted. If the person is an international student, the passport and visa details, the port of entry, funding sources, citizenship, and dependent details are recorded. Institutions can also record person's biographic, academic honors, and employment details.

Each person can be assigned an institution-defined person type such as prospect, applicant, advisor, staff, admission evaluator, graduate, self-service faculty, self-service enrollment staff, and self-service student. Mandatory data is defined for each person type. For example, an email address may be mandatory for a person type of applicant.

In Oracle Student System, person confidential information is recorded and categorized into data groups. Each data group is a collection of information such as a person's billing address, telephone numbers, and degrees received.

Institutions import person details entered by inquirers and applicants through self-service, from flat files provided by the government or third-party sources such as Customer Relations Management (CRM) and UCAS. The admission import process imports person details, and may either create new records or update existing ones.

For information on importing person details for admissions, see Chapter 4, Admissions, Importing Recruiting Details, Inquiries, and Applications.

Figure 3–1 shows the person details process flow.

Figure 3–1   Person Details Process
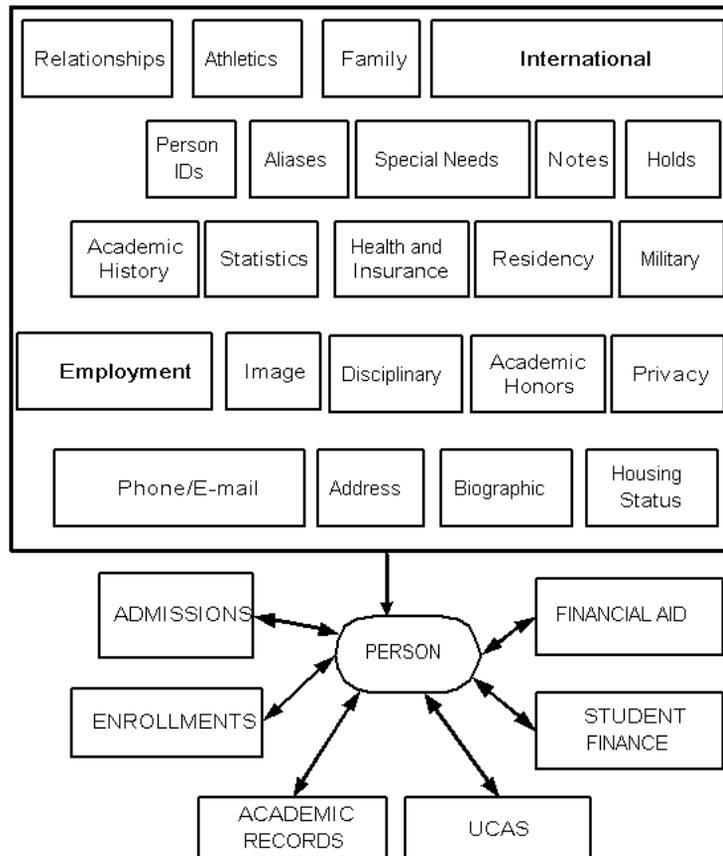
Person International Details

In the United States, institutions can record details related to international academic 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 student's or exchange visitor's program in the United States.

Person ID Groups

Institutions 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. Institutions may have to redefine person ID groups based on their needs and policies. Oracle Discoverer's integration with Oracle Student System enables dynamic creation of person ID groups. Discoverer is an end-user's adhoc query, reporting, and analysis tool that enables rapid access to data. Examples of ID groups include Sight for sight-impaired students who require aids in lectures and Research for students who volunteer for research projects.

Holds

Institutions can apply holds to prevent administrative or academic activities like an admission offer, to restrict student enrollment, as a result of progression evaluation, and when a student fails to pay fees. Hold effects are system-defined and the effect of a hold is determined by its type. Hold types may belong to an academic or administrative category. Hold effects are assigned a level, and institutions can only attach effects of the same level to a hold type.

Academic holds prevent admission or enrollment in a program or program group, enrollment in a unit set or a unit; restrict enrollment to an attendance type or nominated credit points; enforce enrollment in a specific unit, and prevent awarding or disbursement of funds. Administrative holds prevent actions such as the releasing of results, mailing of program material, and the issuing of identity card and transcripts. An administrative hold can prevent graduation.

During enrollment, institutions check for holds before confirming a unit attempt, changing an invalid unit attempt to enrolled, and before lifting a discontinuation.

Student Finance applies holds when a student fails to pay a fee. Institutions create a hold plan that specifies the fee types to which the holds would apply and the threshold hold balance. If the calculated hold balance for a student exceeds the threshold amount specified in the hold plan, a hold is applied.

Academic Records applies academic holds when a student unit attempt fails progression rules. Institutions may also apply holds without the context of a progression rule. Holds applied on financial aid can be to exclude all or specific funds from awarding, or to exclude all or specific funds from disbursement.

When holds exist on all funds from being awarded, the manual awarding process can override these holds. However, you cannot override holds existing on specific funds. Institutions can override disbursement holds on specific or all funds.

Tracking

The progress of an application is monitored to ensure that the applicant satisfies all the pre-admission requirements. Once an admission offer is made and accepted, the post-admission requirements may be tracked to completion to enable enrollment in units of a program. During the assessment of a student unit attempt, assessment items can be tracked at various stages like assignment received from student, sent to assessor, received from assessor, and returned to student.

Tracking is done at different stages and is of different types such as admission processing, post admission, and research thesis examination. Institutions can create their own tracking types and attach them to the system-defined types. Institutions can use tracking types to define requirements or steps for a process. For example, in admissions, tracking types are attached to different admission process categories such as undergraduate, graduate, and special programs.

Attached to each tracking type are requirements or tracking steps, to be checked at different stages. For example, a tracking type of basic requirements may have associated steps such as GRE test, letter of recommendation, transcript, etc. Institutions may 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.

A tracking item is a document or process being monitored that can be 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.

In admissions, an application may require submission of more than one personal statements. A tracking item is created for the application to track these statements. Sometimes, submission of some personal statements is required and others is optional. Such statements may 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 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. When two or more tracking steps belong to the same group, completing one step automatically

completes the rest of the steps in the group. 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 in cases 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 and so on. If business days and sequential is 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.

Figure 3–2 shows the tracking process.

Figure 3–2   Tracking Process
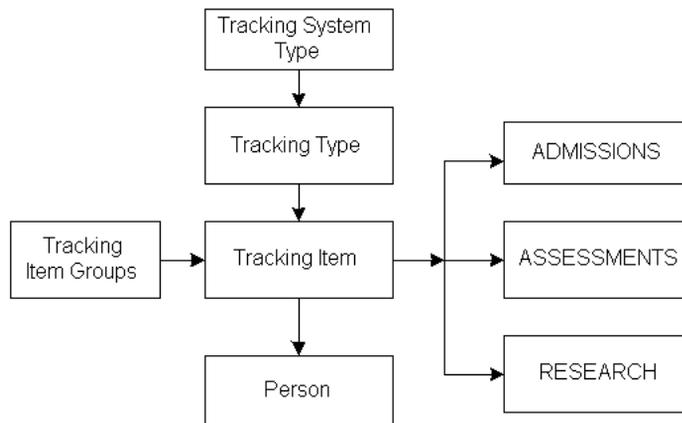
Configuring Window Layout

The windows in Oracle Student System can be configured to define the access privileges to a window or a tab in a window, and the appearance of buttons opening child windows.

The Person Details window has different tabs, the privileges for which can be configured in the Configuration Form window. The administrator may restrict the privileges to either query only or hide the tabs. However, you cannot hide all the

tabs. Even if you choose to do so, the funding tab appears by default. Institutions can also configure the appearance or non-appearance of buttons to open other child windows.

Prerequisites

None.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Setup - Form Configuration - Configuration Form window

Steps

1. Select the responsibility and click the Access Privilege tab to enter the access privileges for an assigned responsibility in the Configuration Form window.

2. Click the Navigation tab to set up the display of buttons for child windows in the Person Details window.

   Note: A maximum of four buttons can be displayed in the Person Details window. To access extra buttons, click **Others** and select the appropriate one from the list of values.

3. Click **Copy** to copy the configuration details from an existing responsibility to another responsibility.

4. Save your work.

Person Details

Institutions maintain person details such as address, alias name, family, housing, and residential status. When a person record is first created, the person type Others is assigned by default. It may be changed to types such as faculty, applicant, self-service student, or admission evaluator.

Institutions can also record details of person's prior military service, participation in sports, special needs due to physical disabilities, and voter registration. A person's relationship with another person in the organization or the organization itself, for example, an employee or an advisor, may be recorded. A person's family details can also be recorded. One of the family members is considered as a primary member. The address of the primary family member is inherited by the person

deemed as a minor. Institutions also maintain a person's criminal history if any. Institutions may apply holds if the person has a criminal history.

Institutions can set criteria to check for duplicate persons while importing person information from outside or while creating new persons. The information used in defining matching criteria comes from various source types such as a list of prospects, applications, transcripts, admission test results, self-service admission applications, and self-service inquiry prospects.

Prerequisites

Person types, person ID types, person alias types, ethnic origin, and religion codes must be defined.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Person Details window

Person Reference - Person Query window

Steps

1. To query for an existing person, enter the query criteria for person number, person last name, alternate person ID, prefix, or suffix in the Person Details window. The relevant records are displayed in the Person Query Summary window.

    Note: For a detailed query, click the Find Person icon and query in the Find Person window. If there are more than one addresses, this window displays only the primary address for a person number.

2. Select the desired record and click **Accept** to display the record in the Person Details window.

3. To create a new person record, enter the person name in the Person Details window.

4. Save your work.

    Note: If a duplicate record is entered, the Duplicate Person Details window opens up and displays the duplicates.

5. Click **Create/Update Person** in the Duplicate Person Details window to modify the new record.

6. Optionally, click **Select Record** to make changes to the duplicate record displayed or click **Cancel** to enter a fresh person record.

7. Save your work.

   Note: The person number is automatically created if the profile HZ generate party number is set to Yes. If it is not, enter it manually.

8. Click relevant tabs to enter information associated with a person.

   Housing status details apply only for enrolled students.

   Note: When a person's details are entered for the first time, the person type defaults to Others. 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.

9. Save your work.

10. Click **Academic Honors** or click **Others** and select Academic Honors to enter person academic honor details in the Academic Honors window.

    For information on academic honors, see Chapter 4, Admissions, Entering Inquiries and Creating an Applicant Record.

    Note: The order of appearance of buttons in the Person Details window is based on the configuration in the Configuration Form window.

11. Click **Academic History Details** or click **Others** and select Academic History Details to enter person's academic history.

    For information on academic history details, see Chapter 4, Admissions, Maintaining Academic History.

12. Click **Employment Details** or click **Others** and select Employment Details to enter the employment details of the person.

    Note: Occupation codes must be defined.

13. Click **Athletic Details** or click **Others** and select Athletic Details to enter athletic details in the Person Athletic Details window. Click **Test Scores** to view or enter person admission test scores.

    For information on admission test results, see Chapter 4, Admissions, Evaluating Applications.

14. Click **Person Image** or click **Others** and select Person Image to load the image of the person.

Specify the path where the image exists and click **Load Image** to upload the image.

15. Click **Military Details** or click **Others** and select Military Details to enter details of the person's military service, if any, in the Person Military Details window.

    Note: This window is available only if the IGS:Country Code profile is set to US in the profile options.

    The military assistance type and status, military service, and military separation types must be defined.

16. Click **Family** or click **Others** and select Family to enter person family details in the Family Details window. Click relevant tabs to enter academic history, employment, and other details of the family members. Click **Person Details** to enter person details for the family members in the Person Details window.

17. Click **Health** or click **Others** and select Health to enter details of person health in the Person Health and Insurance Details window. Click relevant tabs to enter the insurance and health requirement details. Click **Holds** to attach holds to the person.

    Note: The insurance types, immunization types, and statuses must be defined

    For information on holds, see Applying and Releasing Holds.

18. Click **Statistics** or click **Others** and select Statistics, and click relevant tabs to enter the income tax and voter registration types and their associated codes, demographic, 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 only once 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 accordingly. The catalog is automatically populated for initial admittance term, matriculation term, or most recent admittance term, when the profile IGS:Person catalog is set accordingly.

    Note: In the Others tab, the religion field is displayed only if the profile option IGS:Decides whether the religion tab has to be displayed, is set to Yes.

19. Click **Disciplinary** or click **Others** and select Disciplinary to enter details of person's criminal history, the nature of the crime, and the action taken. Click **Holds** to apply holds to the person in the Person Hold Details window.

20. Click **Relationships** or click **Others** and select Relationships to enter or view details of person relationships with other persons or with an organization.

21. Click **Privacy** or click **Others** and select Privacy to enter details of person that must be kept confidential in the Person Privacy Details window.

22. Click **Holds** or click **Others** and select Holds to apply or release holds in the Person Hold Details window.

    For information on holds, see Applying and Releasing Holds.

23. Click **Special Needs** or click **Others** and select Special Needs to enter details of a person's special needs due to disability in the Person Special Needs window.

    For all special need types except None, the special need allowance types, additional support levels, and the special need service codes must be defined.

    Note: If a person has special needs existing, you cannot enter a record with a special need type of None. If a person has a special need type of None, you cannot enter records for any other special need types.

24. If the person type is faculty, click **Faculty Degree Details** or click **Others** and select Faculty degree details to enter the degree details of the faculty.

    Note: This button is displayed only if there is an active person type of faculty.

    For information on faculty, see Chapter 2, Program Structure and Planning, Setting Up Faculty Information.

25. Click **Notes** or click **Others** and select Notes to attach note types to the person.

    Note: Note types must be defined.

26. Query for a person's basic details like last name, first name, date of birth, email address, etc. in the Person Query window.

27. Click **Addresses History** to view details of the person's existing addresses in the Addresses History window. Click **Usages** to view details of the usage of the address in the Usages window.

    Note: The **Addresses History** button is enabled only if the person has addresses.

28. Click **Program Attempt** to view details of the person's program attempts in the Student Program Attempt window.

Click **Progression** to view details of the level of person's progression in the Progression Details window. Click **Details** to view details of the program attempt in the Program Status window. Click **Advanced Standing** to view advanced standing details in the Advanced Standing Detail Inquiry window. Click **Next Program** to view details of the next program and click **Previous Program** to view details of the previous program.

For information on student program attempts, see Chapter 5, Enrollments, Creating Program Attempts.

29. Click **Program Enrolled** to view details of the program in which person is enrolled in the Student Program Attempt window.

Guidelines

Person Types are described as follows:

- Prospect is one 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 multiple active applications exist in different programs.

- Student is a person 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 is one 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 is one 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 is one who is indicated as the instructor of a unit section. If a valid Faculty person type already exists for a person, and the person is assigned to teach additional unit sections, the Faculty person type is not changed, nor is an additional Faculty person type created.

- Advisor is one who is related to another person through the relationship type Advisor of.

- Staff is one who is indicated as a coordinator or contact person for a location or venue belonging to the local institution.

- External Contact is one who has a relationship type of Contact of with a non-local institution or organizational unit.

- Nonimmigrant student is a nonimmigrant or nonresident for immigration purposes, who is not a citizen or permanent resident of the U.S. and has been admitted to the U.S. for a temporary stay. A student with an F-1 visa is an example of a nonimmigrant.

- Exchange visitor is a foreign national who is granted a J-1 visa by the INS. It includes persons who visit the United States for interchange of the person's skill and knowledge in the fields of education, arts, and sciences.

- Other is one who does not meet the requirements of any of the other system-defined person types.

The person records in Oracle Human Resources Management System, associated with the person type Employee, can be linked to those in Oracle Student System to enable synchronization of data between the two applications. The data from Oracle Human Resources cannot be updated in Oracle Student System.

Oracle Student System's integration with the Oracle product, Discoverer, facilitates dynamic creation of person ID groups.

See Also

For general information on Person Reference, see Person Reference Overview.

Entering Person International Details

In the United States, institutions can track, record, and maintain details of international students and exchange visitors. The student's program of study, program funding source, and the country of birth, citizenship, or permanent legal residence are recorded. For a person, institutions can record either

SEVIS is a Student and Exchange Visitors Information System that maintains information on international students and exchange visitors. Oracle Student System transfers new or modified information to SEVIS via interface tables. SEVIS processes the information and the institution can download the data through a batch interface within the required timeframe of the processing.

A person number can have only one active nonimmigrant or exchange visitor record.

Prerequisites

Person types must be defined.

Visa types, country codes, and funding sources must be defined.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Person Details window

Steps

1. Query the person in the Person Details window.

2. Click **International** or click **Others** and select international from the list of buttons to open the Person International Details window. Click relevant tabs to enter details regarding passport, visa, port of entry, citizenship, funding, and dependents. For information on display of buttons in the Person Details window, see Configuring Window Layout.

   Note: The port of entry and expiry dates must be within the range of the visa issue and expiry dates.

   Note: Data is displayed in the dependents tab, if the student has relationships of child or spouse, entered in the Person Relationships window. Then the **Activate** button is displayed in the dependents tab by default.

3. Click **Activate** to activate the relationship and the reason for activation in the Terminate/Activate Dependent window.

4. Save your work and click **Back** to return to the Person International Details window. Now the window displays the **Terminate** button in place of the **Activate** button.

5. Click **Terminate** to terminate a relationship in the Terminate/Activate Dependent window.

   Note: You cannot activate and terminate a relationship on the same day.

6. 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.

7. 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 educational levels of associate, bachelors, doctorate, high school, language testing, masters, primary, and 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.

   Note: This button is enabled only if the profile IGS: Country Code is set to US at the time of installation.

   The status of the I-20 defaults to active. Based on the action taken, it can be terminate or complete.

   The program, funding, and employment details must be entered in that order. Save your work after each entry.

   The action tab is enabled only when the I-20 effective date is earlier than or the same as the current date. In the program tab, if the educational level is Other, you must enter the remarks.

8. In the employment tab, enter the employment details, save your work, and click **Create Employer** to enter the employer details in the Institutions window.

   Note: This tab is enabled only when the I-20 effective date is earlier than or the same as the current date.

9. Save your work and return to the Person International Details window.

10. Click **Exchange Visitor** to enter details of exchange visitors in the Person Exchange Visitor window.

    Note: This button is enabled only if the profile IGS: Country Code is set to US at the time of installation.

    The program, funding, and site of activity details must be 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 the same as the current date.

11. Save your work.

Guidelines

The action types for an exchange visitor can be as follows:

- Amend program
- Approve failure
- Conclude failure
- End program
- Exchange visitor extension
- Exchange visitor matriculation
- Extend failure
- Other infraction
- Terminate exchange visitor

The action types for a nonimmigrant student can be as follows:

- Complete program
- Defer program
- Extend program
- Terminate program

SEVIS requires that institutions be able to identify when nonimmigrant students, holding specific visa types are authorized to drop below a full-time enrollment status. In addition, institutions have the ability to record a comment when a student returns to a full-time enrollment status.

Oracle Student System allows the enforcement of full-time program enrollment by ensuring that students have minimum number of credits or have forced attendance. Institutions can further apply these validations in an enrollment category, or create an enrollment category especially for nonimmigrant students. Institutions can also choose to create Person ID groups for specific students and override existing final minimum credit or forced attendance type validations for the person ID group. The validations are used to govern student enrollment in unit attempts, compelling students to enroll in the required number of units for full-time attendance.

Students may drop below the configured full-time enrollment if permission is granted by an administrator. The administrator grants this permission by overriding enrollment eligibility and specifying the duration of the authorized

drop. For nonimmigrant students, the administrator must also provide a government-defined code specifying why the authorization was granted.

Institutions run a process to identify students who have returned to full-time status after dropping below.

See Also

For general information on Person Reference, see Person Reference Overview.

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 them through a flat file, and dynamic creation using Discoverer. Institutions may import persons from one ID group to another, import files of person IDs into groups, copy persons from existing group to form a new group, and delete persons from a group.

Prerequisites

Persons must have been created in Oracle Student System.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Details - Person ID Groups - Person ID Group Definitions window

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 numbers of persons to be included in the group.

   The details of the members are displayed in the Details tab.

5. Click **Copy Current Group** to copy the members of the current group to quickly create a new group.

Note: 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**.

    Note: 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.

See Also

For general information on Person Reference, see Person Reference Overview.

For information on enrollment eligibility overrides, see Chapter 5, Enrollments, Unit Attempts and Eligibility.

Applying and Releasing Holds

Institutions apply holds to persons when they do not satisfy the institution's requirements. A hold may have different hold type effects attached. A hold type effect is the consequence of applying the relevant hold type. Hold type effects can expire before a hold type. Only administrative holds are applied through the person subsystem. However you can view academic holds.

To apply or release an administrative hold, the hold authorizer must have an assigned responsibility and must be a person type of staff.

Prerequisites

Hold types must be defined.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Holds - Person Hold Details window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Set Person ID Group Holds

- Release Person ID Group Holds

Steps

1. To apply a hold to a group of persons, run the Set Person ID Group Holds concurrent process.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To manually apply a hold, query the person number in the Person Hold Details window.

3. Select the hold type and the hold start date.

   Note: To manually apply a hold, the responsible user must have an Oracle Student System person type of staff and a customer party attached to the user name.

4. To expire the hold effects, click **Hold Effects Maintenance** and enter the expiration date in the Hold Effects Maintenance window.

   Note: 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.

   Note: To specify an expiration date for the hold effect, you must have the same responsibility as the user who applied the hold.

5. To manually release a hold, select the hold expiration date in the Person Hold Details window.

   Note: The person releasing the hold must have the same responsibility as the one applying the hold.

6. To release a hold for a group of students, run the Release Person ID Group Holds concurrent process.

7. To view the history of hold effects, click **Hold Effects History** in the Person Hold Details window.

Guidelines

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.

See Also

For general information on Person Reference, see Person Reference Overview.

For information on enrollment holds, see Chapter 5, Enrollments, Unit Attempts and Eligibility.

For information on academic holds, see Chapter 8, Academic Records, Applying Progression Rules and Outcomes.

For information on holds in student finance, see Chapter 6, Student Finance, Working with Holds.

Tracking

Tracking items with tracking types attached are created to track processes and the progress is based on the number of steps completed. These items can be manually created or initiated by processes in other subsystems. In the admissions subsystem, applications are tracked to completion before making an offer or rejecting the application. Administrators define pre- and post-admission requirements as steps for an admission process category and assign tracking items to them. In Academic Records, a process is run to initiate tracking items for student assignments. In Admissions, a process is run to initiate tracking items for application processing.

Prerequisites

Tracking types must be defined. Tracking statuses must be defined.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Tracking - Items - Tracking Items window

Person Reference - Tracking - Step Catalog - Tracking Step Catalog window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Tracking Item Report

Steps

1. To create a tracking item, enter the tracking type, item status, item subject, and tracking item originator in the Tracking Items window.

   Note: The item completion due date is calculated and displayed based on the target days and the action days specified from the tracking type.

   Note: If override offset calculation is selected in the Tracking Items window, you can change the completion due date and the action date for the tracking step is updated with this date. This option is available only when business days 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.

2. Save your work. The tracking ID is automatically created.

   Note: The option to override offset calculation is disabled once the tracking item is created.

3. Click **Group Membership** to assign the item to a tracking group in the Tracking Item Group Membership window.

4. Click **Maintain Tracking Groups** to view details of other members in the group in the Tracking Groups window. Click **Tracking Group Notes** to attach notes to the group in the Tracking Group Notes window. Click **Edit Note** to make changes to the note in the Text Notes window.

5. Save your work and return to the Tracking Items window.

6. In the Tracking Steps region, the associated tracking steps are displayed. Select relevant options to complete or bypass the tracking step. For an active tracking item status, you can create new steps manually. You may choose to publish the step in self-service.

   Note: Select bypass if the step is not required for completion of the tracking item.

7. Click **Early Exit** to change the tracking item status to canceled when performance of the remaining tracking steps is not required.

8. Click **Update Group Limit** to update the step group limit.

   Note: The value of the step group limit must not be less than 1.

9. Click **Tracking Step Notes** to attach notes to the tracking step in the Tracking Step Notes window.

10. Run the Tracking Item Report concurrent process for a list of tracking items of a particular tracking type.

For information on running a concurrent process, see Concurrent Process Procedure.

See Also

For general information on Person Reference, see Person Reference Overview.

For information on tracking in admissions, see Chapter 4, Admissions, Tracking Requirements.

For information on tracking in academic records, see Chapter 8, Academic Records, Grading.

4

Admissions

The Admissions process starts with recruiting for admissions, goes through inquiries and applications and ends with admitting students.

Admissions includes the following:

- Overview of the Admissions Process

- Maintaining Recruiting Details

- Managing Inquiries

- Entering Applications

- Maintaining Academic History

- Importing Admission Information

- Processing Applications

- Admitting Students

- Closing Admissions

- Generating Admission Statistics

Overview of the Admissions Process

One of the key elements of an institution's business is admissions. The process of admissions begins much before the start of the academic calendar for which applications will be reviewed. The process starts with recruiting prospective students, goes on to inquiries, collecting information from and sending information to those interested in the institution, and then to processing and reviewing applications of prospective students. The process ends with an admission offer and

the student confirming enrollment. The institution may offer admission in a future term or the student may defer the offer made to a future term.

During the process of recruiting applicants, a person contacted by the institution may later inquire further about programs, apply for admission, and enroll. If an inquiry is submitted by a prospective student, the institution must identify the items of information requested, and mail the package to the inquirer. This may lead further to an application or several applications, each for a different program.

Each application receives its own, unique, system-generated application ID, whether entered in self service, by an administrator using forms, or imported from a third-party source. Each application also receives an admission process category (APC) and administrators may select an application type for the application from those attached to the APC. Application types defined by an institution can be freshman, international, undergraduate, or graduate.The institution links fees and deposits that an applicant must pay to an application type. For an APC the institution defines steps or requirements that can be tracked to completion, such as transcripts, admission test results, credentials, and personal statements. Requirements can be those that applicants must submit for the application to be evaluated and others that must be submitted after an admission offer is made and accepted.

An applicant applies for a program and may enter unit set preferences and units. A unit set comprises core, stream, minor and elective units. On completing requirements, applications are ready for evaluation. Administrators sort applications into review profiles and further into review groups to which they assign evaluators. Decision makers may decide on outcomes for application, final units or units sets referenced in the application, to offer an applicant based on various factors. These may include evaluator rating, calculated academic index, academic history, and admission test scores. Administrators enter admission decisions in the system as admission outcomes and with each outcome, the reason for the decision. For an application outcome of offer or conditional offer, administrators must specify a date by which the applicant must respond to the offer.

Apart from the above core functions, the admissions process can import data back and forth between Oracle Student System (OSS) and OSS self-service, and between OSS and interface applications, such as Oracle's Customer Relationship Management (CRM) suite. If data from the government or other agencies is loaded into interface tables, admissions can also import this data. The admissions subsystem can also store and generate admission statistics for government reporting.

Maintaining Recruiting Details

Institutions need to reach out to prospective students. They may use Oracle's Customer Relationship Management (CRM) solution for recruiting.

Recruiting precedes inquiries and applications, but may not always result in an inquiry or an application.

The recruiter can manually enter recruiting details for a prospective student or import these details from CRM and other third-party sources through interface tables. Recruiting details basically consist of person information such as interests and academic history. They can also include requirements, placement test exemptions if any, and calculated values for the probability of a prospect applying or applying and enrolling. If calculation of probability is outsourced, import these values.

Prerequisites

Interests, housing types, special services, and employment types must be defined.

Admission tests, probability types, and recruitment information categories must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Admission Inquiries - Record Admission Inquiries window

Admission - Direct Admission - Direct Admission window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Import Probability Values

Steps

1. Use the Record Admission Inquiries window or the Direct Admission window to create a recruiting record. First enter basic person information, save, and click **Recruitment** or **Recruiting** to enter recruiting information.

    In the relevant tabs of the Recruitment window, enter details on academic history, schooling, admission test exemptions, interests, special needs, and probability type and source.

Select Very Important Person to mark a candidate that the institution is interested in. Select Deactivate Recruit Status if the candidate is no longer interested in being recruited.

2. Save your work.

3. Run the Import Probability Values concurrent process to import probability values from interface tables.

   For information on running a concurrent process, see Concurrent Process Procedure.

4. As the admission period approaches, run the Ad Hoc Letter concurrent process to send out general information such as brochures, prospectus and newsletters to the recruits.

5. To create a set of person records for prospective students from CRM or third-party sources, run the Admission Import Process with the source type set to Prospect List. See Importing Admission Information.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For information on importing person details of prospective students, see Importing Admission Information.

Managing Inquiries

Inquiries request specific information used to apply for admission.

The inquiry process comprises of these three tasks.

- Entering Inquiries

- Making Inquiry Packages

- Processing Inquiries

Inquiries for a program may come from prospective students through self service, an agency, over the telephone, by mail, or directly at the university. A prospect may request information about several programs. The prospect may be a returning student, an alumni, a recruit, a transfer, an international prospect, a first-time student, or a senior citizen.

Inquiry status indicates progress of inquiry processing. An inquiry is first received, then processed and acknowledged and finally the entire package requested delivered completing the inquiry.

Enter inquiries and process them to identify the items of information that would constitute the package for an inquiry. Items in a package may be flyers, brochures, and view books. Administrators define package items for entry statuses, programs, unit sets, and information types. Entry status is the level of education being inquired about such as freshman, graduate, professional, or research.

When identifying the items required for an inquiry, administrators consider entry status, or program, or unit sets in a program, and information type. They may also consider inquirer characteristics or special needs. A package for an international prospect, therefore, would be different from that for a domestic prospect with respect to tuition fees, accommodation charges, advanced standing, programs, and unit sets offered.

Figure 4–1 shows the inquiry process.

Figure 4–1   The Inquiry Process
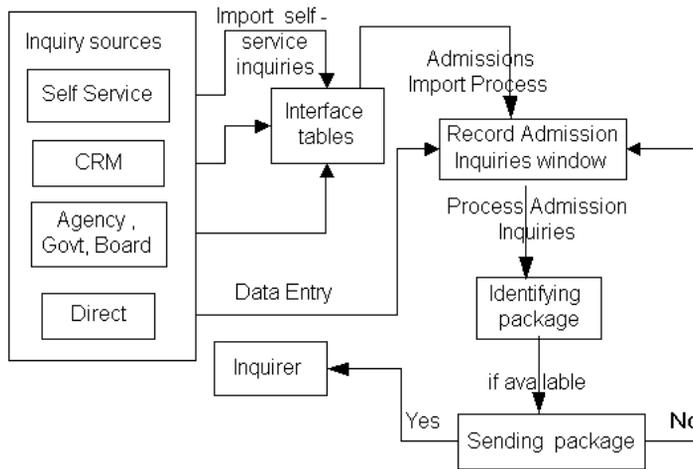
Entering Inquiries

Enter inquiries that come in directly, into the Record Admission window. For inquiries from other sources, import inquiry information. For information on importing inquiries, see Importing Recruiting Details, Inquiries, and Applications.

Prospects may apply for financial aid (FA) even 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 FA applications from Institutional Student Information Report (ISIR) and College Scholarship Service (CSS) files. See Chapter 7, Financial Aid Management, Financial Aid Applications.

A prospect may submit multiple inquiries. Each inquiry receives its own system-generated inquiry number. An inquiry consists of inquirer information 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). When entering an inquiry, administrators select inquiry status of Received. When all available package items have been mailed to inquirer, change inquiry status to Acknowledged and to Completed when all package items have been mailed.

Prerequisites

Inquiry source types, entry statuses, entry levels and processing statuses, information and characteristic types, and package items must be defined. Programs and unit sets must be mapped to inquiry entry statuses.

Activity codes, and interest codes must be defined.

Information types, inquirer characteristics, and inquiry detail codes must be defined.

Admission test types, credential types, and transcript source, types and statuses must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Admission Inquiries - Record Admission Inquiries window

Steps

1. To create an inquiry record for an existing person, use the Find Person window to enter person details. For a new person, directly enter person details in the Record Admission Inquiries window.

   Note: If the system detects duplicate person records during data entry in the Record Admission Inquiries window, the Duplicate Person Details window opens. Determine whether to save or clear the currently entered data.

2. Enter basic inquirer information. Click **Person Detail** to open the Person Details window. Use this window to enter photographs, and information on how to contact, employment, special needs, insurance, immunization, residency, privacy, passport, visa, citizenship, statistics, and other details in the appropriate person windows. Save information in one person window before moving onto the next. See Chapter 3, Person Reference, Person Details.

3. Click **Activities** to enter information on interests and activities in the Person Activities window.

4. Click **Credentials** to enter credential types and date of receipt in the Credentials window. See Evaluating Applications.

5. Click **Admission Tests** to open the Admission Test Summary window. Here click **New** to enter admission test scores in the Admission Test Results window. See Approving Units and Unit Sets.

6. Click **More** and then click **Academic History** to enter academic information in the Academic History Details window. See Maintaining Academic History.

7. Click **More** and then click **Academic Honors** to enter academic honors information in the Academic Honors window. For information on entering academic honors for an applicant at the time of entering an application, see step 8 of Creating an Applicant Record.

8. Enter inquiry details in the Inquiry Instance region of the Record Admission Inquiries window.

9. For inquiries with entry status of Freshman, click **Program Inquiry** to enter program preferences in the Inquiry Programs/Inquiry Unit Sets window. Next click **Inquiry Unit Sets** to enter unit set preferences for a program in the Inquiry Unit Sets Preference window.

   ■ For inquiries with entry status of Transfer or Graduate, enter unit set preferences.

   ■ To view given preferences for all inquiry instances of an inquirer, go to the All Inquiry Programs or All Inquiry Unit Sets tabs.

10. Click **Characteristics** to open the Inquiry Characteristic Types window. Enter features that make one inquiry instance distinct from another.

    Click the All Inquiry Characteristic Types tab to view the characteristics of all inquiries of the person for the same academic calendar.

11. Click **Information Types** and enter for each inquiry the type of information required, whether academic, extra-curricular, or related to child-care facilities.

12. Click **More Details**, to enter more details about inquiry such as career goal, school interested in, person responsible for inquiry, person registering inquiry, inquiry method.

    Click the All Details tab in this window to view a summary of the details of multiple inquiries.

13. Save your work.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For general information on inquiries, see Managing Inquiries.

For information on entering person details, see Chapter 3, Person Reference, Person Details.

For information on academic history, see Maintaining Academic History.

For information on admission test scores and credentials, see Evaluating Applications.

For information on importing inquiries, see Importing Admission Information.

For information on creating new inquiries from ISIR/CSS files, see Chapter 7, Financial Aid Management, Financial Aid Applications.

Making Inquiry Packages

Inquiries request information. Information is divided into package items. Administrators must identify package items for an inquiry that will comprise the final package to be sent to the inquirer. Factors such as the entry status of the inquiry, the program and unit set preferences within a program, type of information requested, and the characteristics of the inquiry, determine the package.

Information varies, for example, for a domestic freshman, for an international freshman, for a freshman with a disability, for a freshman requesting transfer, for a freshman within the state, and for a freshman out of state.

Prerequisites

Inquiry entry statuses, entry levels and processing statuses, information and characteristic types, and package items must be defined.

Package items for inquiry levels, programs, information types and inquirer characteristics must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Admission Inquiries - Record Admission Inquiries window

Steps

1. Select an inquiry instance, and click **Characteristic Types** to view characteristics.

2. Close and return to the Record Admission Inquiries window.

3. Click **Information Types** and for each information type entered, click the Information Type Package Items icon to select from associated package items in the Register Enquiries window.

4. Click **Back** to return to the Record Admission Inquiries window. Click **Package Items** to view package items for each inquiry and for all inquiries in the Inquiry Mailed Package Items window.

   Select Do not Mail to exclude any of the package items for the specified program and unit set.

5. Save your work.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For general information on inquiries, see Managing Inquiries.

Processing Inquiries

Identify package items relevant to each inquiry and process inquiries to mail all available items, complete inquiry processing and close inquiries.

On receipt and entry of an inquiry, administrators set the inquiry status to Received. Inquiry processing updates the inquiry status to Acknowledged if certain items in the package are unavailable, and to Complete if the whole package is mailed. It also updates the Last Processing Date with the date on which the concurrent process was run for batch processing or the system date when the inquiry was manually processed.

An inquiry may contain package items that are unavailable and likely to remain unavailable. In such cases, to close the inquiry, administrators can force processing of incomplete package which updates the inquiry status to Complete.

Prerequisites

Package items and their availability must be defined.

Inquiry processing statuses must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Admission Inquiries - Record Admission Inquiries window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Process Admission Inquiry

- Inquiry Package Status Report

- Person Address Labels Report

Steps

1. Select an inquiry and click **Package Items** in the Record Admission Inquiries window. Use the Inquiry Mailed Package Items window that opens to process the inquiry.

2. View package items and their availability for each inquiry. If items are available, enter Mailed Date, save and close to return to the Record Admission Inquiries window. Here update the inquiry status to Complete. The last processing date in manual processing will be the current system date. If some items are unavailable and cannot be mailed, set the inquiry status to Acknowledged.

3. To close an inquiry despite package items likely to remain unavailable, select Set all unsent items as mailed. This updates mailed dates with the current system date in the Inquiry Mailed Package Items window. Then return to the Record Admission Inquiries window to update the inquiry status to Complete.

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

   For information on running a concurrent process, see Concurrent Process Procedure.

5. Run the Process Admission Inquiry concurrent process to process a batch of inquiries to closure or completion status. This picks up all inquiry records with inquiry status of Received and Acknowledged, checks for availability of package items not sent, sends these, updates the inquiry status and the Last Processing Date in the Record Admission Inquiries window.

6. To close all inquiries of an inquirer even if inquiries have unavailable package items, select Force processing of incomplete package in the Record Admission Inquiries window. Run the Process Admission Inquiries concurrent process again with the parameter for process incomplete packages set to Yes. The job

now picks up inquiry records and updates the status to Complete despite inquiries having unavailable package items.

7. Run the Person Address Labels Report concurrent process for inquiry person ids, to produce person address labels for mailing.

Guidelines

Inquiry processing has 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

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For general information on inquiries, see Managing Inquiries.

Entering Applications

The admissions process starts when applications are received either directly as a print application, through self service, through an agency or third-party source, or from the government.

The admissions process consists of the following sections:

- Creating an Applicant Record

- Creating an Application

An application would typically consist of information about the applicant, academic areas of interest, and other information relevant to the application process.

An applicant can submit multiple applications each for different session details. A session consists of an academic period, an admission period, and an application processing category (APC). Applications for different periods or categories may have the same or different programs. For each application, the system generates a unique application ID.

The same applicant can also submit multiple instances of an application if preferences for an APC are enabled. Each instance shares the application ID and session details but has a different preference number and program details.

An application cannot be considered complete and closed if any of the instances are still active. in other words, although individual application instances can be complete, the application containing the instances will not be complete until all of the related instances have been processed to closure. A complete application instance is one where the application is rejected, withdrawn, or offered admission and accepted.

Figure 4–2 shows the application entry process.

Figure 4–2   Application Entry Process
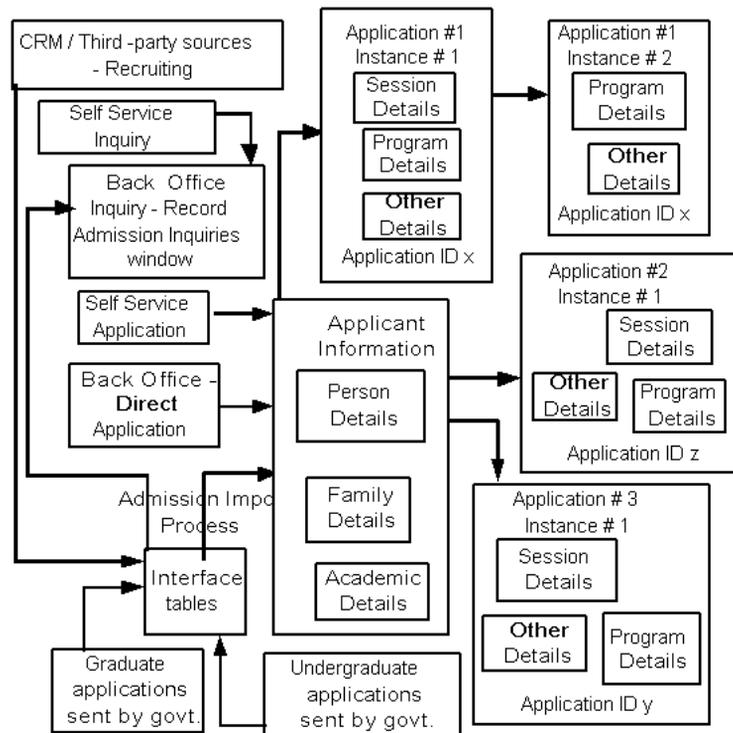
Creating an Applicant Record

Administrators can create an applicant record directly in forms or for applications through other sources, such as self service or flat files provided by the government, import them. An applicant record includes besides basic person information,

further details such as addresses, contacts, family details, employment details, academic honors, and activities. It also includes admission test scores, credentials and academic history.

An applicant could be a returning student, alumni, staff, recruit, inquirer, or a new student.

Prerequisites

Activity codes and interest codes must be defined.

The setup for admission tests, credentials, and transcripts must be completed.

Responsibility

Oracle Student System Super User

Navigation

Admission - Direct Admission - Direct Admission window

Steps

1. Use the Find Person icon to query for an existing person in the Student System database. For a new student enter the necessary person information in the Direct Admission window.

   Note: If the system detects duplicate person records during data entry, the Duplicate Person Details window opens. Determine if any of the person records retrieved is a match, or if the new record should be saved or cleared.

2. Click **Person Detail** to open the Person Details window. Use this window to enter photographs, and information on addresses, email, employment, special needs, insurance, immunization, residency, privacy, passport, visa, citizenship, statistics, and others details in the appropriate person windows. Save information in each window before moving onto the next. See Chapter 3, Person Reference, Person Details.

3. Return to the Direct Admission window. Click **Family Details** to enter contact information in the Family Details window. See Chapter 3, Person Reference, Person Details.

4. Click **Activities** to enter information on interests and activities in the Person Activities window.

5. Use **More** to find and click **Academic History** to enter academic information in the Academic History Details window. See Maintaining Academic History.

6. Use **More** to find and click **Credentials** to enter credential types and date of receipt in the Credentials window. See Evaluating Applications.

7. Use **More** to find and click **Admission Tests**. In the Admission Test Summary window, click **New** to enter test scores. See Approving Units and Unit Sets.

8. Use **More** to find and click **Academic Honors** to enter details of academic honors received.

9. Save your work.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For general information on applications, see Entering Applications.

For information on inquiries, see Managing Inquiries.

For information on recruiting, see Maintaining Recruiting Details.

For information on importing applications, see Importing Admission Information.

Creating an Application

An applicant may apply for different programs, in different sessions. When entering these applications, administrators assign to each one a method of processing or Admission Process Category (APC). The application receives the application type defined as default for the APC. Administrators can select, if required, a different application type that is also associated with the APC. The APC brings with it pre-defined steps on application processing and information that the applicant must provide before the application can be considered complete and ready for review. Tracking items are attached to these requirements in the tracking subsystem. As each requirement is met, administrators can update the tracking subsystem with this information to stop any further tracking of the item. For more information on defining requirements for the applicant to complete, see Tracking Requirements.

Each application submitted receives a unique, auto-generated application ID. Administrators may query an application by this application ID. The application ID also appears on the Submitted Applications page in self service.

A combination of application session details (academic calendar, admission calendar, and APC) and program offering option forms an application instance. The system stores some application information, such as application fees, at the

application level, and stores other application information, such as admission decisions, at the instance level. An applicant may submit multiple instances of an application for different programs in the same session and enter preferences. In this case all instances would share a common application ID. Multiple instances can be created for an application only if administrators enable the APC step for preferences.

The applicant may submit personal statements with each application but must pay the relevant application fees. Each personal statement represents a single essay question. An applicant can specify unit set preference and educational goals before and after enrollment. The system stores unit set preferences and educational goals post enrollment at the application instance level.

Prerequisites

Admission calendar must be configured. Academic and admission calendars and the relationship between them must be defined.

Admission categories must be defined and mapped to system process types, fee categories, funding sources, enrollment categories, and program types.

Admission process categories must be defined with the necessary application processing steps.

Application types must be defined and mapped to admission process categories.

Educational goals, applicant intent, academic interest, special interests, and talents must be defined.

 Application entry status, entry levels, special groups 1 and 2, and qualification levels must be defined.

Personal statement types must be defined and mapped to tracking step codes.

Fee types, statuses and payment methods must be defined.

Program offering options must be linked to admission periods and APC.

Responsibility

Oracle Student System Super User

Navigation

Admission - Direct Admission - Direct Admission window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Admissions Acknowledgement Letter

Steps

1. In the Direct Admission window, create a new applicant or query an existing one.

2. Use **More** to find and click **Admission Tests**. In the Admission Test Summary window, click **New** to enter admission test scores of the applicant for test type and segment in the Admission Test Results window.

   Click **Convert Test Scores** to sum up test scores and display this combined test score in the Test Results region of the Admission Test Results window.

   Click **Update Tracking** to complete tracking of admission test scores.

   Alternatively, to import test scores of a batch of applicants, run the Convert and Import Test Scores concurrent process. Or run the Admission Import Process with import source type mapped to the system source type of test results and for each applicant click **Convert Test Scores** in the Admission Test Results window to arrive at combined test scores. See Importing Test Results.

3. Save your work.

4. To create a new application, in the Direct Admission window, query the applicant and click **New Application**. Enter calendar details and APC in the Session Details window. Click **Continue** to transfer these details to the Applications window.

   The application automatically receives the system default application type for the APC. Select if required another application type associated with the APC.

   Note: Before saving the application, click **Session Details** to change calendar instances or APC. Saving the application disables the Session Details button in the Applications window.

5. In the Applications window, select Common Application if applicant submits a general application form issued by the College Board in addition to the institution's own application form. Select the applicable Special Group 1 and for it the applicable Special Group 2 to sort applications by institution-defined groups.

   Enter program, location, attendance, source and entry level details in the Program tab.

   Enter the applicant's projected completion period for the program applied in the Completion Details tab. Select Display Derived Completion Date for system to calculate completion date for application outcome of offer. For the

calculation, the system considers given projected completion period, program length attached to program offering, and date aliases defined for terms.

Note: To enable calculation of completion date, include the step, projected completion period, for the APC step group of mandatory application details.

Select Apply for Financial Aid if the applicant has applied or plans to apply.

Change if necessary default fee and enrollment categories, and funding sources for the application.

6. Save your work.

   Note: Saving updates the application summary region of the Direct Admission window with the application record created. Return to the Direct Admission window and click **New Application** to create a second application for the same applicant. Save to update the application summary region with details of the second application.

7. In the Direct Admission window, query a saved application and click **Open Application** to make changes or to enter final unit set.

8. To enter instances for an existing application, place cursor on the application in the program application instance region of the Applications window, select File from the menu, and select New. Enter new program details for the new application instance.

   To enter a preference number for the application, enable application preferences in the Process Category Details window. Save your work. In the Direct Admission window, query the saved application, click **Open Application** and enter preference number for the new instance. Save your work.

   Note: If administrators attach preference number to an APC, even if no application instance exists, administrators must enter a preference number for the application. The instance and the application share the same application ID, application level information and session details.

9. In the Applications window, click **Application Details** to enter applicant intent, academic interests, special interests, special talents, and other institutions to which the applicant has applied for the same program.

10. In the Applications window, click **Personal Statements** to enter personal statement type and date received. Click **Update Tracking** to update complete the tracking of one pre-admission requirement. For more information on requirements, see Tracking Requirements.

11. In the header region of the Applications window, use **More** to find and click
Application Fees. Enter application fee payment details for the applicant.

    Note: For payments by credit card using self service, the system generates a
    reference number and updates the Application Fees window to aid tracking.

12. In the Applications window, click **Notes** to enter relevant, application-related
information other than the information already entered.

13. In the Applications window, click **Educational Goals** to enter possible
educational goals of applicant following enrollment.

    Note: The Educational Goals window displays for each application, one
    pre-enrollment educational goal. This is populated from that entered in the
    Applications window under the Miscellaneous tab.

14. In the Applications window, click **Desired Unit Sets** to enter the applicant's
desired unit sets in order of preference. A decision maker when approving the
final unit set for an application, may consider the applicant's choice. See
Approving Units and Unit Sets.

15. In the program application instance region of the Applications window, use
More to find and click **Unit**. Enter applicant's choice of unit, class, location and
teaching period in the Direct Admission Unit window.

    Note: The outcome status defaults to Pending. Based on decision taken,
    decision maker changes outcome status of each unit at the time of admission
    offer to Denied or Offer.

16. In the program application instance region of the Applications window, use
More to find and click **Candidacy**. Enter submission dates, research topic, and
principal supervisor in the Research Candidacy Details window if the
application is for a research program. Enter thesis details if known and
information on the principal supervisor.

    Note: Enter candidate's commencement date if other than the default program
    start date but cannot be less than the program start date alias instance. The
    teaching period chosen for the application must allow entry of the applicable
    commencement date.

17. Save your work.

18. Run the Admissions Government Offer File Load concurrent process to import
freshman applications provided by the government from interface tables.

    For information on running a concurrent process, see Concurrent Process
    Procedure.

19. Run the Admissions Postgraduate Government Offer File Load concurrent process to import graduate applications provided by the government from interface tables.

Guidelines

Application types are institution-defined.

Admission process types are:

- Program Admission - used to process applications for regular award programs
- Non-award - used to process applications for non-award programs or a single subject
- Re-admit - used to process applications of a previously discontinued program
- Short Admission - used to process applications for award programs of a shorter duration
- Transfer - used to process applications of students transferring from one program to another

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For general information on applications, see Entering Applications.

Maintaining Academic History

Enter academic history of a prospective student while creating an inquiry or an application. Advanced Standing, the calculation of applicant's academic index and predicted GPA, and the admission decision process all consider and use these details.

Academic history details for a program attempted and completed include the class rank and size, total grades for all coursework, and grades at the term and unit level. The institution may wish to recalculate and convert these grades and GPA from the grading scale used in the previous institution to that used in the present institution to make them more meaningful. Grade conversion details for the transcript are saved.

At the time of inquiry or application the transcript status may be provisional or incomplete. Even when a prospective student applies for a program, details such as final GPA on a program just completed may not be available.

Prerequisites

Transcript sources, types and statuses must be defined.

Grading scales, grade conversions from one grading scale to another, and unit grades must be defined.

The profile option Institution Grading Scale must be defined.

Program attempted or earned details must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Admission Inquiries - Record Admission Inquiries window

Admission - Direct Admission - Direct Admission window

Steps

1. To enter academic history such as program, degree and institution at the time of inquiry, click **Academic History** in the Record Admission Inquiries window. See Entering Inquiries. To enter the same information for an applicant, click **Academic History** in the Direct Admission window. See Creating an Applicant Record.

   Enter details of the applicant's previous institution, dates of attendance, program and whether the applicant is currently attending the institution. Select Required if applicant must submit to complete application requirements. For more information on requirements, see Tracking Requirements.

2. Click **Self Reported Details** in the Academic History Details window to enter grade-related details for the program attempted in the Self Reported Details window as reported by applicant or inquirer. This includes grading scale, GPA, GPA units attempted, unit credit points attempted and earned, unit grade points, class rank and size.

3. Click **Transcript Details** in the Academic History Details window to select transcript source, type and status in the Transcript Details window.

   Enter the date of receipt and issue of transcript. Also enter term type, class rank, class size, and GPA. Save to view converted GPA and system-calculated percentile, decile, quartile and quintile values based on class rank and size.

If authorized, you may override percentile, decile, quartile and quintile values based on class rank and size.

Save your work and click **Update Tracking** to complete tracking of transcripts.

4. In the Transcript Details window, click **Term Details** to enter term-wise summary of grades and credit points. Save your work.

5. In the Term Details window, click **Unit Details** to enter unit-wise summary of grades and credit points. Save your work.

6. In the Unit Details window, click **Degree Audit Details** to send unit grade summary to the degree audit interface. This information is used in calculating advanced standing in cases of transfer. Save your work.

7. In the Academic History Details window, click **Recalculated Details** to manually recalculate academic history scores in the Recalculated Units window. Save your work.

8. In the Academic History Details window, click **Advanced Standing Details** to view approved and granted credit points for a program in the Advanced Standing Details window.

9. Save your work.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For information on advanced standing, see Chapter 8, Academic Records,.Evaluating Applications for Advanced Standing.

For information on degree audit, see Chapter 8, Academic Records,.Degree Audit.

Importing Admission Information

Administrators import admission data from external sources into OSS. These may include electronic test score reports, data files of prospective student recruitment information purchased by the institution, transcripts, applications, and information entered on the web by inquirers.

The type of information imported may be divided into these three areas:

- Importing Recruiting Details, Inquiries, and Applications

- Importing Transcripts

- Importing Test Results

Recruiting information, inquiries, applications, transcripts and test results are all considered to be sources of information in the import process. A source type is created for each of these categories of information to be imported. For each source, administrators can define batches of records which are loaded into interface tables for them to be imported. The Admission Import Process imports data defined for the specified batch. Administrators can also define match set criteria for each source type, to indicate the amount of data to be used by the system in identifying partial or exact matches for existing person records. While importing data, if discrepancies occur in person or admission information, the import process follows rules defined for the data category. Rules can state any of the following courses of action:

- Existing values in OSS tables retained and discrepancies disregarded

- Discrepancies imported to update existing records in OSS tables

- Discrepancies between imported and existing OSS records to be reviewed

If the discrepancy rule is set to review, administrators can manually review records to decide final action on errors for each record.

While importing recruiting details, inquiries and applications, the import process creates new person records in OSS and updates if necessary, existing person records.

Figure 4–3 shows the admission import process.

Figure 4–3   Admission Import Process
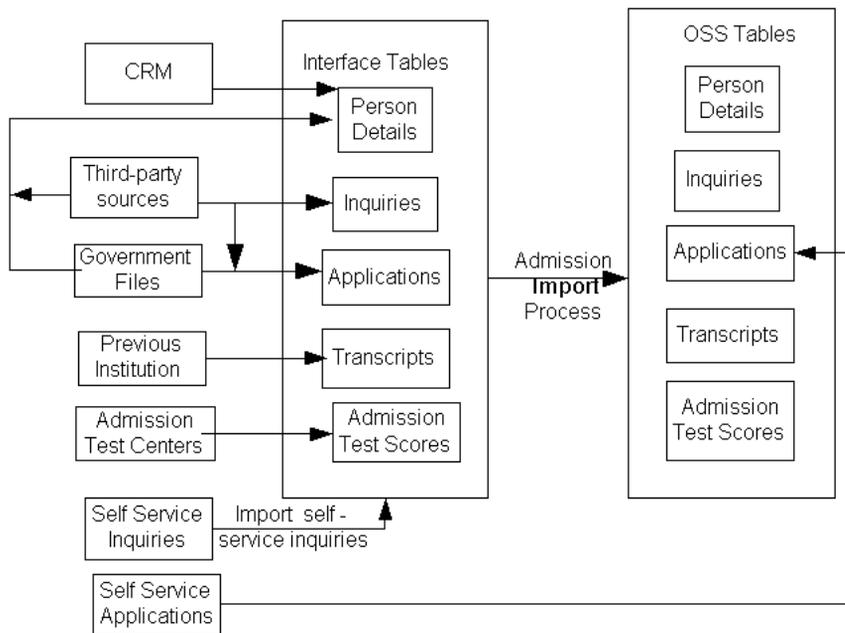
Importing Recruiting Details, Inquiries, and Applications

Administrators import admission information into OSS from interface tables using the Admission Import Process. For instance, recruiting information is loaded into interface tables from CRM or third-party sources in the same way as inquiries and applications.

The Admission Import Process imports person details with recruiting, inquiry or application information. Data is imported according to pre-defined discrepancy rules. The Admission Import Process therefore either creates new person records or updates existing person records while importing prospect lists, Self Service inquiries and applications.

The Import Process imports only those records that match pre-defined match set criteria. If discrepancy rule is set to review, administrators can compare partial matches between records in the interface tables and those in OSS tables. On reviewing, administrators can choose to update the existing record with the "discrepancies" found, create another new record, or disregard it.

Prerequisites

Batch IDs for records must be provided in interface tables.

Source types, categories and discrepancy rules must be defined.

Match criteria sets must be defined for each source type.

Setup data related to person details, inquiries and applications must be defined.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Setup - Match Criteria Sets - Match Criteria Sets window

Admission - Admission Setup - Setup Import Process - Source Categories - Source Categories window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Admission Import Process

- Import Process Person Detail Report

- Import Process Person Details Review Report

- Exact / Partial Match Report

- Import Process Inquiry Details Report

- Import Process Inquiry Details Review Report

- Import Process Application Detail Report

- Import Process Application Details Review Report

Admission - Partial Matching Records Review - Partial Matching Records Review window

Steps

1. Define match sets and for each data element in a match set define criteria for import in the Match Criteria Sets window. Criteria can be an exact match or a partial match or both.

2. Define rules to be followed when discrepancies occur while importing data categories of a selected source type, in the Source Categories window.

Select Person Data source category and click **Detail Discrepancy Rules** to define discrepancy rules for each person attribute in the Detail Discrepancy Rules window.

3. Run the Admission Import Process concurrent process to import a batch of recruiting detail. Enter the batch ID and match set for the selected source type mapped to the system source type of Prospect List.

   For information on running a concurrent process, see Concurrent Process Procedure.

4. Run the Admission Import Process concurrent process to import inquiries raised in self service. Enter the batch ID and match set for the selected source type mapped to the system source type of Self Service Web Inquiry.

5. Run the Admission Import Process concurrent process to import applications from external sources such as agencies. Enter the appropriate batch ID and match set for the selected source type mapped to the system source type of Application.

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

7. Run the Import Process Inquiry Details Review Report concurrent process to compare imported inquiries with existing inquiries and review errors.

8. Run the Import Process Application Detail Report concurrent process to check applications that were not successfully imported.

9. Run the Import Process Application Details Review Report concurrent process to compare imported applications with existing applications and review errors.

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

11. Run the Exact / Partial Match Report concurrent process to generate a list of imported person records that were an exact or partial match with existing records.

12. Run the Import Process Person Details Review Report concurrent process to compare imported person records with existing ones and review errors.

13. Use the Partial Matching Records Review window to review details of partial matches between imported and existing person records. Select No Match Import to update the existing record with the partial matching record in the interface table. Or select Discard to retain existing record and disregard the partial matching record in the interface table.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For information on importing admission details, see Importing Admission Information.

Importing Transcripts

Transcript information relates to an applicant's academic past. Evaluators while rating an application may use this information as a basis for their evaluation. Institutions may grant advanced standing based on programs and units that an applicant has completed. Institutions may also use unit grades and credit points earned in the past to predict an applicant's GPA and calculate academic index. As institutions have their own grading schema, administrators may need to convert grades into the grading schema used by the institution applied to for reference.

Transcripts are provided by an applicant's previous institution. Administrators can load transcript information into interface tables and then import these into the Oracle Student System.

Prerequisites

Transcript information must be defined.

Batch IDs for records must be provided in interface tables.

Source types, categories and discrepancy rules must be defined.

Match criteria sets must be defined.

The profile option, Institution Grading Scale must be defined.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Setup - Match Criteria Sets - Match Criteria Sets window

Admission - Admission Setup - Setup Import Process - Source Categories - Source Categories window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Admission Import Process

- Import Process - Transcript Details Error Report

- Import Process Transcript Detail Review Report

Steps

1. In the Match Criteria Sets window, define match sets and for each data element in a match set define criteria for import. Criteria can be an exact match or a partial match or both.

2. In the Source Categories window, define rules to be followed when discrepancies occur while importing data categories of transcript source type.

3. Run the Admission Import Process concurrent process to import a batch of transcripts. Enter the batch ID and match set for the selected source type mapped to the system source type of Transcript.

    For information on running a concurrent process, see Concurrent Process Procedure.

4. Run the Import Process - Transcript Details Error Report concurrent process to check for errors while importing transcripts.

5. Run the Import Process Transcript Detail Review Report concurrent process to compare imported transcripts with existing transcript records and review errors.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For information on importing admission details, see Importing Admission Information.

Importing Test Results

The institution may require that applicants take placement tests, for example, the Test of English as a Foreign Language (TOEFL) for international students. The institution may define score ranges for various test segments and may recommend units for placement if applicant's test scores are within the defined range. For information, see Approving Units and Unit Sets. Admission tests help academic advisors place students into the correct level of program. Most U.S. students take standardized tests as a part of education, if applying for post-secondary education.

Applicants generally take standardized admission tests before they apply for a program. On receipt of these test results, administrators load them into interface tables and import these into the Oracle Student System.

Prerequisites

Test result information, test types and test segments must be defined.

Batch IDs for records must be provided in interface tables.

Source types, categories and discrepancy rules must be defined.

Match criteria sets must be defined.

Responsibility

Oracle Student System Super User

Navigation

Person Reference - Setup - Match Criteria Sets - Match Criteria Sets window

Admission - Admission Setup - Setup Import Process - Source Categories - Source Categories window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Admission Import Process

- Import Process Test Results Detail Report

- Import Process Test Details Review Report

Steps

1. In the Match Criteria Sets window, define match sets and for each data element in a match set define criteria for import. Criteria can be an exact match or a partial match or both.

2. In the Source Categories window, define rules to be followed when discrepancies occur while importing data categories of Test Results source type.

3. Run the Admission Import Process concurrent process to import a batch of test results. Enter the batch ID and match set for the selected source type mapped to the system source type of Test Results.

   For information on running a concurrent process, see Concurrent Process Procedure.

4. Run the Import Process - Test Results Details Error Report concurrent process to generate details of test results imported.

5. Run the Import Process Test Details Review Report concurrent process to compare imported test results with existing test result records and review errors.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For information on importing admission details, see Importing Admission Information.

Processing Applications

Institutions must first determine if applicants qualify for the programs to which they have applied.

Institutions then process applications by:

■ Tracking Requirements

■ Evaluating Applications

Administrators assign each application an APC and for each APC, define step groups and steps. Step groups include program, person data, application details, application outcome, and offer response. Steps for application outcome step group can be allowing multiple offers, overriding outcome, perform pre-enrollment on offer and automatically make an offer. Administrators may choose to assign these steps as mandatory requirements that must be fulfilled for an offer to be made. These requirements are usually documents that the applicant must submit, some before an offer can be made and others before enrollment.

Admissions tracks the completion of admission processing and post-admission requirements and notifies applicant of missing items. In enrollments, administrators can act upon results of post-admission requirements tracking by either denying enrollment or warning the student.

Administrators can also apply pre-admission and post-admission rules defined for application processing. These rules allow for sets of requirements to be assigned to applicants based on data in the application. For example, a rule can be defined to ensure that all applicants to an Art program are required to submit a portfolio in addition to the general application requirements.

After an applicant submits all the required documents and the institution begins the process of evaluating the application. For evaluation, administrators sort applications into review profiles and within a profile into review groups. Evaluators assigned to a review group evaluate the application. Credential ratings, admission test scores, and applicant's past academic standing may influence evaluator rating.

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

Figure 4–4 shows application processing.

Figure 4–4   Application Processing
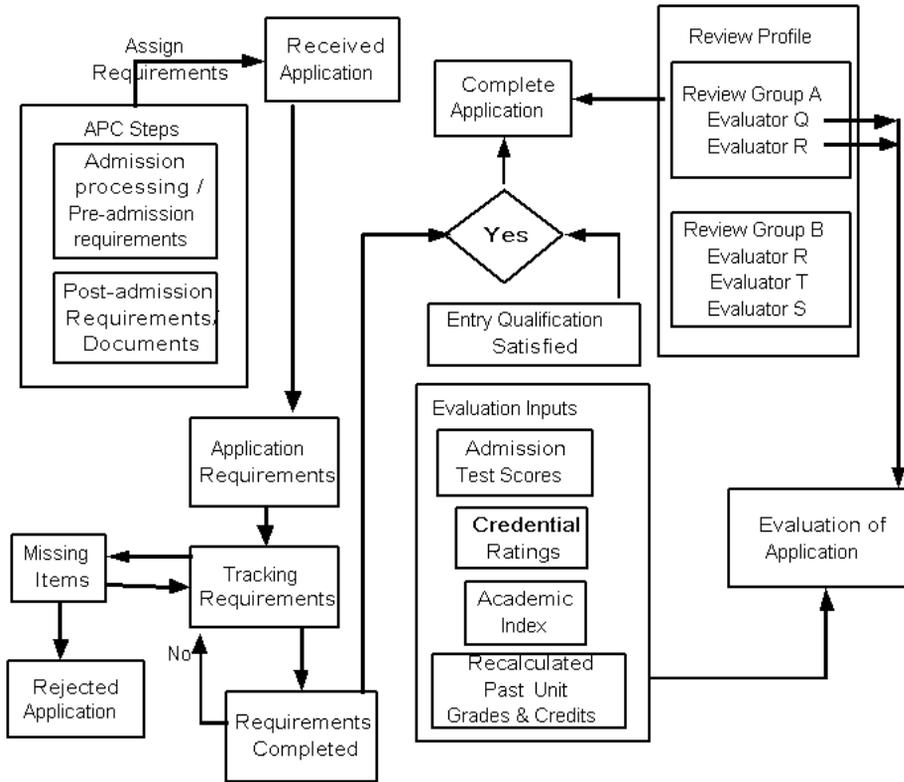
Tracking Requirements

An applicant must submit certain documents before the application can be evaluated for admission. These are pre-admission or admission processing requirements. Similarly, after an offer is made, the applicant must submit other documents before or within a specified period of enrolling. These are post-admission requirements. The institution tracks completion of these requirements, notifies applicants of missing items, and updates the completion status of the application. Only when the application is complete can evaluation begin.

Administrators define these requirements as steps for an APC and assign tracking items to them. Steps can be made mandatory and a tracking order specified. Rules

can also be associated with an APC. The rules when parsed result in tracking items, which can also be assigned to an application.

Each application is assigned an APC. Administrators can manually assign the requirements attached to an APC to the application or run a job to assign these to a batch of applications.

Administrators also enter pre-admission and post-admission rules and apply these rules while processing applications.

Prerequisites

Tracking steps and types must be defined.

Application completion and application processing statuses must be defined.

Admission processing categories must be defined.

Pre-admission and post-admission requirements for APCs must be defined and assigned rules.

Responsibility

Oracle Student System Super User

Navigation

Admission - Admission Setup - Setup Admission Process - Process Category Details - Admission Process Category Detail window

Admission - Direct Admission - Direct Admission window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Assign Requirements to Application Instances

- Admission Tracking Item Completion

- Admission Application Completion

- Admission Completeness Check Report

- Admissions-Missing Items Letter

Steps

1. In the Admission Process Category Detail window, query an admission category and attach a system admission process type to create an APC. Enter

offer response offset date for each admission process category. See Confirming Admission and Pre-enrolling.

Save and click **Default Steps** to assign all existing process steps to each of the step groups of the new APC. Then delete to exclude the steps not needed, especially as some groups may have conflicting process steps. Enter, if required, the step order for these steps and select Mandatory for steps or requirements that must be tracked to completion. For steps with a number restriction, enter the number that it is to be restricted to.

Alternatively, save and for each step group, select the necessary steps, enter the step order, number restriction if any, and select Mandatory for those that are to be tracked to completion.

Note: To track steps, follow the procedure above, save and click **Tracking Type** to enter tracking items for each tracking step in the Tracking Types window. If the tracking is not used to ensure all documents required for admission are submitted, set application completion status to the default of Complete for the APC.

2. Save your work.

3. Click **Admission Processing Rules** to define rules to be applied when processing applications in the Admission Process Category Tracking Rules window.

4. Save and return to the Admission Process Category Detail window. Now, click **Post Admission Rules** in the Admission Process Category Tracking Rules window to define rules to be applied after an offer is made. See, Confirming Admission and Pre-enrolling.

5. Save your work.

6. To manually assign the steps defined for the APC to an application with the same APC, go to the Direct Admission window. Query the appropriate applicant, select an application, click **Open Application** and then click **Assign Requirements**.

7. Click **View Requirements** in the Applications window, to view requirements assigned to an application. Administrators can also use this window to manually change the entry qualification status from the default of Pending to Satisfied. Save your work.

8. Run the Assign Requirements to Application Instances concurrent process to assign requirements or APC steps to a batch of applications. Set the

requirement type parameter to admission processing or post-admission requirements.

For information on running a concurrent process, see Concurrent Process Procedure.

9. Once requirements are assigned, run the Admission Tracking Item Completion concurrent process to check and update tracking status of each APC tracking item to Complete.

10. Run the Admission Application Completion concurrent process to update application tracking step status to Complete.

11. Run the Admission Completeness Check Report concurrent process to produce a list of missing items.

12. Run the Admissions Missing Items Letter concurrent process to inform applicants of pending requirements that need to be met to enable application processing to continue.

13. On submission of missing items, repeat steps 10 and 11.

Guidelines

Application completion statuses are:

- Pending if documents not yet assessed; default status

- Non applicable if documents not required

- Incomplete if all documents required to be submitted not given

- Satisfied if all documents are submitted and satisfactory

- Unsatisfied if documents submitted are unsatisfactory

- Denied if applicant refuses to submit document

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For general information on application processing, see Processing Applications.

For information on APC types, see Guidelines, Creating an Application.

For information on evaluating applications, see Evaluating Applications.

Evaluating Applications

Once all requirements are met, administrators sort applications into review profiles and these further into review groups and assign evaluators to these review groups. For example, the basis of an application review profile may be grouping alphabetically by applicant surname, by applicant or by institution address, by market code, by organization, or by program. Review groups for the review profile by institution address could be institutions in the South from the states of Georgia, Florida, and Texas, excluding the postal codes 30301 to 31199 of Atlanta in Georgia and 75201 to 75398 of Dallas in Texas.

Administrators may choose concurrent or sequential evaluation for a review profile. If sequential evaluation is selected, assign evaluators in sequential order to a review group.

Evaluators may, before they rate an application, be expected to review the credentials of an applicant. Application evaluation may therefore consider applicant past scores, admission test scores, credential ratings and calculated academic index.

Each evaluator must finish rating the application before the application processing status of the application can be set to Complete and an offer made.

Prerequisites

Application review profiles and review groups must be defined.

For review groups, evaluators must be assigned.

Rating types and scales must be defined.

Evaluator and program approver person types must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Admission Setup - Setup Application - Application Review Profile - Application Review Profile window

Admission - Direct Admission - Direct Admission window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Assign Review Group

- Assign Evaluators to Application Instances

Steps

1. In the Application Review Profile window, query a review profile and click **Review Group** to define review groups for the profile. Save your work.

2. In the Review Group window, select a review group and click **Evaluator** to assign evaluators to it. Save your work.

   Note: Only persons with evaluator person type are eligible to evaluate. See Chapter 3, Person Reference, Person Details.

3. To assign a review profile, review group, and evaluators to an application, query an applicant, select an application and click **Open Application** in the Direct Admission window.

   In the Applications window, click **Ratings**. Enter a review profile and select a review group for the profile in the Review Group Code tab of the Ratings window. Save your work. This automatically takes evaluators assigned to the review group for the application.

   Note: Administrators can only assign a review profile and group, and evaluators to an application if the application satisfies the entrance qualifications and if the applicant completes submission of all documents required.

4. Alternatively run the Assign Review Group concurrent process to assign review groups to applications and the evaluators assigned to the review groups.

   For information on running a concurrent process, see Concurrent Process Procedure.

5. To assign evaluators directly to applications run the Assign Evaluators to Application Instances concurrent process.

6. In the Direct Admission window, query an applicant and click **Credentials** to rate each credential type received in the Credentials tab of the Credentials window.

   Select credential type and enter review comments for it along with reviewer name in the Review Details tab of the Credentials window.

   Note: For recommendation letter credential type, enter details of recommender in the Recommendation Details tab of the Credentials window.

7. Save your work and return to the Direct Admission window.

8. Use **More** to find and click **Admission Tests**. View test scores in the Admission Test Summary window. Click **Open** to view admission test scores of the same

applicant for test type and segment in the Admission Test Results window. For information on entering and converting test scores, see Creating an Application.

9. Save and return to the Direct Admission window.

10. Click **Academic History** and then click **Recalculated Details** to view GPA, grade and credit points earned in applicant's previous program attempt. See Maintaining Academic History.

11. Save and return to the Direct Admission window.

12. Select the application to be evaluated, click **Open Application** and in the Applications window, click **Ratings**.

13. Enter calculated academic index of the applicant in the Indices tab of the Ratings window.

    To import academic indices of a batch of applicants, run the Import Process Academic Index concurrent process.

14. Enter application rating in the Evaluation tab of the Ratings window.

15. Save your work.

Guidelines

Application processing statuses are:

- Received if application is received but yet to be considered

- On hold if application is received but processing kept on hold due to unsatisfactory requirements

- Complete if application processing is complete

- Withdrawn if applicant withdraws application

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For general information on application processing, see Processing Applications.

Admitting Students

On completion of evaluation and processing, an application is ready for an offer. Decision makers consider evaluation, credential ratings, test scores, academic index, and academic history to decide if an application merits an offer. If the institution

decides to make an offer, administrators must first approve unit set and units that the applicant can enroll in before making the offer.

The process of admitting students includes:

- Approving Units and Unit Sets
- Making an Admission Decision

Approving Units and Unit Sets

An applicant submits applications for different programs. For each application, the institution may receive either applicant's preference of unit sets or a combination of desired unit sets and units applied for. The applicant may only choose from the unit sets and units attached to the program selected in the application instance.

If the institution only receives applicant's preference of unit sets, an administrator approves one of them as the final unit set in which the applicant will be enrolled on acceptance of the admission offer. If the application is received via self service, administrators must set up profile option to specify the method of deriving the final unit set.

If the institution only processes applications to specific units, the decision maker must either deny or offer each unit before entering the admission outcome. Admission offers for units can only be made if an offer for the program has been made. The applicant's academic history, credential ratings, admission test scores and the institution's recommended units for test segment may influence the decision to deny or offer the unit.

For a test segment of a test type, the institution may set up a score range and recommends units for a prospective student that may score within this range. An institution can recommend unit placements independently of the admission process for individual units, or in tandem with this process.

Prerequisites

Admission test types and segments for test types must be defined. Minimum and maximum scores and recommended units for test segments must be defined.

Unit sets for a program offering option must be defined. Units to be completed for a unit set or unit set completion rules must be defined.

Unit outcome statuses must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Direct Admission - Direct Admission window

Admission - Admission Setup - Setup Application - Unit Placement Details - Unit Placement window

Requests - Admissions History - Program Application Units - Admission Program Application Instance Unit History window

Steps

1. In the Direct Admission window, query an applicant, select an application and click **Open Application**. In the program application instance region of the Applications window, click **Desired Unit Sets** to view unit set preferences of applicant. To enter applicant's choice of unit sets, see step 15 of Creating an Application.

   Return to the Applications window and enter the final unit set approved for the application. Save your work.

2. In the Unit Placement window, set up score range and enter recommended units and respective versions for a test segment of the selected test type. Save your work.

3. In the Direct Admission window, query the applicant, use **More** to click **Unit Placement**. View units recommended for test segments of a test type in the Unit Placement Details window.

4. Return to the Direct Admission window, select the application and click **Open Application**. In the program application instance region of the Applications window, click **More** and click **Unit** to enter outcome decision for each of the units. To enter units applicants applied for, see step 16 of Creating an Application.

5. Save your work.

6. In the Admission Program Application Instance Unit History window, query by program offering option or by applicant and program offering option to view unit outcome statuses.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For general information on offering admission, see Admitting Students.

Making an Admission Decision

Once the complete information and documentation for an application has been received and processed, and the process of evaluating the application is complete, decision makers can make admission decision and record them in the system.

In addition to the criteria an institution may use to consider applicants for admission, including applicant merit, past academic standing, evaluator rating and credentials, institutions may also consider logistic details of seat availability. Decision makers may decide to admit the applicant to a future term depending on the policies of the institution.

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 Pre-enroll 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 batch of applicants by importing admission decisions. To make offers in batches, administrators must first group person records in the interface tables with unique batch IDs.

Prerequisites

Admission calendar must be configured.

Outcome statuses must be defined.

Source types and match criteria sets must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Direct Admission - Direct Admission window

Admission - Admission Decision Details - Admission Decision Details window

Correspondence - History - Correspondence Interaction History window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Admission Tracking Item Completion

- Admission Application Completion

- Admission Completeness Check Report

- Post Admission Missing Items Letter

Steps

1. Query the applicant in the Direct Admission window and select the application. Click **Open Application**.

2. In the program application instance region of the Applications window, click **More** and click **Key Academic Indicators** to view application and academic details such as GPA, class rank, academic index before making an admission decision.

3. Close and return to the Applications window.

4. Click **Outcomes** to enter admission decision on an application with reason for the decision in the Application Outcome window. For application outcome of future term, enter admission and academic calendar of the future term in which the new application will be created. For application outcome of waitlist, 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 special admission category and any relevant notes in the Special Consideration tab.

    For application outcome of offer, enter date by which applicant must respond to offer in the Offer Deadline tab. See Confirming Admission and Pre-enrolling.

    For application outcome of conditional offer, enter conditions and the date by which applicant must satisfy conditions in the Conditional Offer tab.

5. Save your work.

6. The decision maker can override a given outcome and enter reasons for the change in decision in the Override Outcome tab of the Application Offer Response window.

   Note: Administrator can override outcome status from Conditional Offer and Lapsed to Accepted.

7. Save your work and return to the Applications window. If applicable a new admission outcome can be entered.

8. If a request is made for reconsideration of a rejected application, click **Offer Response** in the Applications window. Select Request For Reconsideration in the Offer Response tab of the Application Offer Response window.

9. Save and return to the Applications window.

10. Click **Decision Notes** in the Outcome tab and then click **Edit Notes** in the Decision Notes window to enter additional information on admission decision or application outcome.

11. Use the Admission Decision Details window to post decisions on multiple applications. Load the interface tables with the applicant and decision-related data. Query the appropriate batch ID, select an application and click **Application Summary Details** to view application details and navigate further to view more academic information.

12. Use the Application Summary Details window to navigate to other windows for more information on applicant to help make an admission decision.

    Click **Ratings** in the Application Summary Details window to view evaluation details of application.

    Click **Admission Tests** in the Application Summary Details window to view test scores of applicant.

    Click **Academic History** in the Application Summary Details window to view academic history and transcript details of applicant.

    Click **Key Academic Indicators** in the Application Summary Details window to view GPA, class rank, and academic index of applicant.

13. Update admission outcome status of application as populated in the interface tables if necessary. Click **Application Decision Details** to enter for the application, the decision details and offer response date. Click **Post Decisions** to update these applications in the system with the new information entered. When all of the records have been successfully processed, the system deletes records from the interface tables.

Note: If decision maker does not enter decision and offer details separately for each application using the Application Decision Details window, system posts with outcome, decision details set as default for the batch. To view these details, click **Default Details** in the Admission Decision Details window.

14. Use the same window to delete applications in the interface table if any or all of the records are incorrect. Again query the appropriate batch ID, select the applications to be deleted and click **Discard Decisions**. To delete all the applications of a batch, select Select All and click **Discard Decisions**.

15. For application outcome of Offer, run the Admissions - Admission Letter concurrent process to intimate applicant of admission offer and date by which applicant to confirm acceptance of offer.

    For information on running a concurrent process, see Concurrent Process Procedure.

16. For application outcome of Conditional Offer, run the Admissions - Conditional Offer Letter concurrent process to intimate applicant of offer, conditions and date by which applicant to satisfy conditions.

17. For application outcome of Rejected, run the Admissions - Rejection Letter concurrent process to intimate applicant of application rejection.

18. For application outcome of waitlist, run the Admissions - Waitlist Letter concurrent process to intimate applicant of waitlist rank and status.

19. For application outcome of No Quota, run the Admissions - No-Quota Letter concurrent process to intimate applicant of no admission due to unavailability of admission seats.

20. For application outcome of Future Term, run the Admissions - Admit to Future Term Letter concurrent process to intimate applicant of admission and academic calendar of future term admission and date by which applicant to confirm acceptance.

21. For application outcome of Suspended, run the Process Suspended Admission Applications process on or after the program start date for this admission period to update the outcome status of suspended to withdrawn. This deletes applications from the system.

22. After an offer is made, run the Admission Tracking Item Completion concurrent process to check and update tracking status of each post-admission APC tracking item to Complete.

23. Run the Admission Application Completion concurrent process to update post-admission tracking step status to Complete.

24. Run the Admission Completeness Check Report concurrent process to produce a list of post-admission missing items.

25. Run the Post Admissions Missing Items Letter concurrent process to intimate applicants of pending requirements that need to be met to enable pre-enrollment on applicant's acceptance of offer.

26. In the Correspondence Interaction History window, query the appropriate applicant and view the history of correspondence that institution has sent.

Guidelines

Application outcome statuses that reflect admission decisions are:

- 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 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

- 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 intermediary status before final irreversible decision to withdraw is taken

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For information on responding to an admission offer, see Confirming Admission and Pre-enrolling.

Closing Admissions

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 Admission and Pre-enrolling

- Reconsidering, Regenerating Applications

An application may have several instances. The application processing status of an admission application will be updated to complete and the application closed if:

- 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

- 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

Confirming Admission and Pre-enrolling

When an offer or conditional offer is made, the institution would generally notify the applicant of the specified response deadline period. Decision makers set an offer response date when entering the decision. See Making an Admission Decision.

If the applicant fails to respond before the offer response date, the offer response status is updated to Lapsed and the application is considered closed, if no other instance of the application is active.

If an applicant is unable to accept an offer in the session applied or prefers to enroll in a later period, the applicant may ask for deferment of the offer. If the program applied for is available in a future session or term, decision makers may approve the deferment, specify the future term, and create a fresh application for it.

When an admission offer is made, if the Perform Pre-enrollment on Offer step is attached to the APC, pre-enrollment occurs. This creates an enrollment record of unconfirmed student program attempt. Otherwise pre-enrollment occurs, on acceptance of offer, creating an inactive student program attempt enrollment record.

For deferred applications, applicants can pay enrollment deposit for a confirmed deferment.

Administrators can view history of applications by applicant, admission calendar and program offering option to ensure all loose ends are tied before declaring admissions closed.

Prerequisites

Offer response and offer deferment statuses must be defined.

Offer response deadlines and offset response days must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Direct Admission - Direct Admission window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Import Offer Response

- Import Offer Response Error Report

- Lapsed Admission Offers

- Clean Up Unconfirmed Student Program Attempts

- Admission Tracking Item Completion

- Admission Application Completion

- Admission Completeness Check Report

- Admissions-Post Admission Missing Items Letter

Requests - Admissions History - Admission Application - Admission Application History window

Requests - Admissions History - Program Application - Admission Program Application Instance History window

Steps

1. Query an applicant, select the application, and click **Open Application**.

2. In the Applications window, click **Offer Response** to enter applicant's response to admission offer made.

3. Select Request For Reconsideration if the applicant would like the rejected application to be reconsidered for an offer.

   Note: To ensure availability of this option, include the request of reconsideration step for the APC.

4. For an offer response of Deferred, enter admission and academic calendar to which deferred and update deferment status to Approved in the Deferment tab.

5. Save and return to the Applications window.

6. Click **More** in the header region of the Applications window and click **Application Fees** to enter enrollment payment details. See step 12 Creating an Application.

   Note: An applicant can pay enrollment deposit amount only for:

   - an outcome status of Offer and offer response status of Accepted

   - an outcome status of Offer, an offer response status of Deferred, and a deferment status of Confirmed

7. Click **Update Tracking** in the Application Fees window to update the tracking step catalog with payment details.

8. If necessary for reference, click **Admission Enrollment Deposit Level Details** in the Application Fees window to view the enrollment deposit setup. This automatically opens the Application Types window with details in the Enrollment Deposit tab with the amount that must be paid.

9. For offer response status of Pending past response deadline and response offset, run the Lapse Admission Offers concurrent process to update offer response status to Lapsed.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: This offer response status can only be entered by the concurrent process.

10. For offer response of Lapsed and APC step of Pre-enrollment on offer, run the Clean Up Unconfirmed Student Program Attempts concurrent process. This deletes unconfirmed student program attempt enrollment records created by pre-enrolling.

11. For an offer response of Accepted, run the Admission Tracking Item Completion concurrent process to check and update tracking status of each APC tracking item to Complete.

12. Run the Admission Application Completion concurrent process to update application tracking step status to Complete.

13. Run the Admission Completeness Check Report concurrent process to produce a list of incomplete information.

14. Run the Admissions - Post Admission Missing Items Letter concurrent process to intimate applicants of pending requirements that need to be met before and immediately following enrollment.

15. Query an applicant, an APC or an admission calendar to view status of all applications and respective fees in the Admission Application History window.

16. Query an applicant or program offering option to view detailed history of applications in the Admission Program Application Instance History window. Details range from completion period through outcome to offer and deferment information.

17. Query the applicant in the Direct Admission window. Select the application for which the applicant has accepted the offer and click **Open Application**.

18. In the program application instance region of the Applications window, click **More** and click **Fee Detail**. In the Establish Fee Contracts window, click **Fee Assessment** to apply fee rates and predict the amount applicant must pay.

    For information on fee rates and charges, see Chapter 6, Student Finance, Creating and Calculating Charges.

19. To predict fees to be paid if contract rates applied, enter rate details in the Establish Fee Contracts window, click **Set Contract** and then click **Fee Assessment**.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For information on setting offset response days, see step 1 of Tracking Requirements.

For information on setting response deadlines, see step 4 of Making an Admission Decision.

For information on entering payments, see step 12 of Creating an Application.

For information on fee rates and charges, see Chapter 6, Student Finance, Creating and Calculating Charges.

Reconsidering, Regenerating Applications

There are three instances where an application may either be updated or created afresh. Updating of applications occur when applicants request reconsideration of rejected applications. Reconsideration involves application review and reapplication of the admission decision process. If the outcome after reconsideration stays rejected, the application is considered closed. If the application outcome changes, the application must be updated with the new outcome.

A new application is created when an applicant defers the offer given 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 enrollment deposit. 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 program applied for is unavailable in the present term but will be offered in a future term. The system creates a new application and sets the outcome status to offer.

Prerequisites

Offer outcome statuses and offer deferment statuses must be defined.

Responsibility

Oracle Student System Super User

Navigation

Admission - Direct Admission - Direct Admission window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Admissions Initialize Reconsiderations Job

- Students with Approved Deferment Report

- Create Deferment Application

- Create Future Term Application

- Admissions-Future Term Second Admission Letter

Steps

1. For rejected applications for which applicants requested reconsideration, run the Admissions Initialize Reconsiderations Job concurrent process. This updates rejected applications with the next admission period and reverts the outcome status back to Pending.This offer response status can only be entered by the concurrent process.

   For information on running a concurrent process, see Concurrent Process Procedure.

   For information on requesting for reconsideration of a rejected application, see step 8, Making an Admission Decision or step 3, Confirming Admission and Pre-enrolling.

2. To identify the number of deferments approved, run the Students with Approved Deferment Report concurrent process.

   For information on deferring an offer and approving a deferment, see step 4, Confirming Admission and Pre-enrolling.

3. To create new applications for approved deferments with specified admission period, run the Create Deferment Application concurrent process.

4. Query the applicant and select the old application in the Direct Admission window. Click **Open Application** in the Applications window and click **Offer Response** to change the offer deferment status from Approved to Confirmed. This enables enrollment payment. See step 6, Confirming Admission and Pre-enrolling. Save your work.

   Click the history icon next to offer deferment status to view history of changes in offer deferment status.

5. Return to the Direct Admissions window to query the new application. Click **Open Application** and click **Offer Response** to change the offer response status from Pending to Accepted to enable enrollment payment.

6. To create new future term applications for applications with outcome of Future Term, run the Create Future Term Application concurrent process. This sets the outcome status of the applications to Offer.

7. Once future term applications are created, run the Admissions - Future Term Second Admission Letter concurrent process to intimate applicants of future term offer.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

For information on the admission decision process, see Making an Admission Decision.

Generating Admission Statistics

The government of a country may define targets for the number of students of a type that an institution must enrol in a year. One 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.

Prerequisites

Student target types and submission intake targets must be defined.

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Admissions Academic Result Requisition

- Admissions Government Enrollment Statistics Return File

Steps

1. Run the Admissions Academic Result Requisition concurrent process to produce an extract file on academic results for submission to the government.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. Run the Admissions Government Enrollment Statistics Return File concurrent process to report on applications forwarded by the government that the institution did not offer admission to.

See Also

For general information on the admissions process, see Overview of the Admissions Process.

5

Enrollments

Enrollments enters and maintains details required to manage student enrollment, program, and unit attempts.

Enrollment comprises the following tasks

- Enrollments Overview
- Pre-Enrolling Students
- Managing Timeslots
- Enrolling Students
- Post Enrollment
- Enrolling Research Students

Enrollments Overview

The process of enrollment can begin in Admissions with a new student seeking admission to a program for the first time, or a returning student seeking readmission, or a student transferring from one program to another new program. Administrators can also directly enroll students in Enrollments although Enrollments through Admissions is preferable as the Admissions process imposes many checks and validations.

Enrollments can be organized into:

- Pre-Enrollment
- Timeslots
- Student Enrollment
- Post Enrollment

- Research Candidacy

Enrollments creates and maintains student enrollment records consisting of program, unit set, and unit attempts. Before creating program, unit, and unit set attempts, administrators validate student details and check student enrollment eligibility by defining and applying enrollment rules that students must satisfy. The Enrollments subsystem assigns time durations for students to confirm a program, unit, and unit set attempts. If the institution tracks careers of its students instead of mere programs, a student may have multiple program attempts and for each program, the relevant unit set and unit attempts.

Administrators can waitlist students if quota for enrollment into units is full and enroll them later when enrolled students drop out, discontinue, or transfer, or the limit of students in a class is raised. Administrators can transfer students between programs, discontinue, or temporarily suspend students and reinstate them later.

Figure 5–1 shows the enrollments process.

Figure 5–1   Enrollments Process Flow
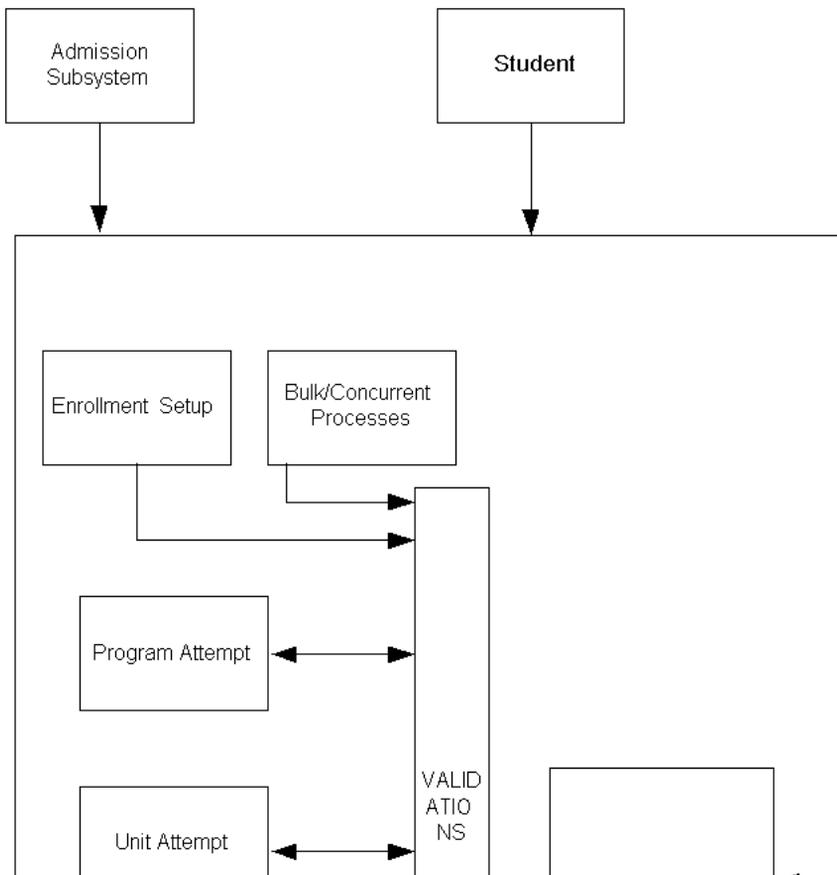
Pre-Enrollment

Administrators can set up automatic or online pre-enrollment to happen when students who apply for admission into a program receive an offer. To do this, admission administrators must include the Perform Pre-enrollment on Offer step to the admission process category (APC). Pre-enrollment transfers student's person and program details from the Admissions subsystem to Enrollments subsystem to create student enrollment records.

A student enrollment record consists of an unconfirmed student program attempt and inactive unit set and unit attempts if unit sets and units are offered in Admissions. While creating unit set and unit attempts, pre-enrollment can establish

fee contracts, if required, between the institution and the student to assess fees at a different charge rate. For more information on fee contracts, see Chapter 6, Student Finance. If unit sets and units are not offered in Admissions, pre-enrollment creates unconfirmed units set and unit attempts from the pattern of study defined for the program in the current academic calendar.

To pre-enroll core units only, administrators must include the core units step for the APC. A program attempt consists of multiple unit sets; parent or major and subordinate or minor unit sets. For example, the parent unit set can be the major, Accountancy, with the minors of Auditing and Taxation. Consequently, a subordinate unit set can be selected and confirmed if a parent unit set is selected and confirmed for a program attempt. Similarly a parent unit set cannot be deleted or ended if any of its subordinate unit sets still exists. Administrators can pre-enroll returning students in discontinued unit sets within the same program offering, if students are enrolled in the unit set before its expiry.

Pre-enrollment assigns to the program attempt created for the current enrollment period, the default enrollment category mapped to the admission category. An enrollment category defines its own method of processing enrollments and enrollment variations for the academic year. Each enrollment category has an attached enrollment method or way in which to enroll students. An enrollment category procedure is a combination of enrollment category, enrollment method, and student commencement type whether new or returning. Administrators may manually change the enrollment category of a student program attempt, if required. For example, a student may belong to an international student enrollment category and subsequent to pre-enrollment, the student may become a permanent resident belonging to the domestic student enrollment category.

Administrators define rules for an enrollment procedure category that are validated against the person and program details entered in a student enrollment record. Validation of these rules results in enabling of different options in a window for a student. For example, if the enrollment step of fee category is included, then administrators can enter a fee category other than the default one mapped to the admission category.

Pre-enrollment assigns an enrollment due date taken from the due date alias set when configuring the enrollment calendar. Administrators can override this default enrollment due date for the student program attempt. Pre-enrollment can happen more than once in an admission period, updating the one student enrollment record created for the academic period. Students or administrators must use self-service to confirm unit attempts within the due date.

If pre-enrollment is not setup as part of admission application processing, administrators can pre-enroll students who receive offers and conditional offers of

admission in a batch creating unconfirmed student program attempts. Batch pre-enrollment done after students accept offers, creates inactive student program attempts. Batch pre-enrollment can also create unconfirmed unit attempts if the pre-enrolled program has a pattern of study for which unit offerings in current academic calendar have been defined. If a pattern of study is attached to the program after students are pre-enrolled, subsequent pre-enrollment of the batch applies the pattern of study to student unit attempts. Pattern of study pre-enrollment can also happen for future academic periods if more than one pre-enrollment period is specified in the pattern of study.

Administrators can also enter program details for new students directly in Enrollments without an admission application to create unconfirmed student program attempts and then pre-enroll these program attempts in a batch. For new students pre-enrollment can happen only if student program attempt is unconfirmed and if the effect of holds on the students are not for the entire academic year. Batch pre-enrollment is the only way to pre-enroll returning students if the student program attempt is inactive or has been interrupted by the student taking a break that expires in the coming academic period.

Timeslots

A timeslot is the time duration in which students must enroll. A timeslot session contains many timeslots. An institution controls periods of enrollment by assigning students to timeslots. Administrators may use defined priority criteria and preferences to assign students to timeslots or assign them randomly.

Administrators may generate timeslots in trial or final mode for a given program type group. The trial mode displays timeslot details that would be produced when generated in the final mode and allows change in details before submission for final generation. 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 timeslot to which they were assigned.

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.

Student Enrollment

For a student record to be created, administrators must define an enrollment session. An enrollment session is a combination of academic calendar, enrollment category, and enrollment method. The academic calendar is the period in which

institutions process enrollments. Each enrollment category defines its own method of processing enrollments and enrollment variations for the academic year. The enrollment method defines the way in which a student is enrolled.

Enrollment administrators must check if students satisfy person, program, and unit enrollment rules to be eligible for enrollment. Administrators notify students that fail this validation so they can increase their credit points. Administrators can override enrollment validations for a specific term or teaching calendar to enroll a student. Oracle Student System provides user hooks that institutions can customize and call when students fail enrollment validations, to enable the institution to override enrollment decisions.

Enrollment creates confirmed program attempts with primary programs indicated in each career and one key program. The key program is used by student finance, financial aid and academic records subsystem for billing, awards and transcript reporting.

An institution uses waitlists or reserved seating to ensure eligible students are placed in unit sections. Administrators can use reserve seats for a category of persons or an organization. Institutions use waitlists to place students in units for which the current enrollment quota is full. To waitlist students or reserve seats, administrators must set up this option and define a limit on the number of students for reserved seating or a waitlist.

Oracle Student System waitlists students on first come first served basis and assigns position numbers to the waitlisted students. Administrators may manually override position numbers assigned to students to resolve time conflicts between a student's enrolled and waitlisted unit sections, for example, and Oracle Student System rearranges the sequence of the waitlist per the new positioning.

Post Enrollment

After the institution enrolls a student, the status of the student's program attempt and unit attempt may change. For example, a student may fail to enroll into units within the specified time even after providing the institution a confirmed intention to enroll. In this case, administrators lapse the program attempt and can later re-instate the lapsed program attempt, if required. A student may discontinue a program attempt for several reasons. The student may, for example, require a break in studies or prefer another offer from a different institution or an offer for a different program. The student may wish to transfer to a different program, different units within the same program, or change to a different program version. Administrators can reinstate discontinued program and unit attempts after an intermission.

Institutions permit students to break from studies by defining intermission periods for a program. 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. The discontinuation of a student's program attempt automatically discontinues any associated unit attempts and notifies the student about the discontinued units with the reason for discontinuation. Administrators apply an administrative unit status to the discontinued unit, or drop the unit. The institution defines administrative unit statuses for a teaching calendar. If the student withdraws at the beginning of the unit attempt, administrators drop or discontinue the unit attempt. If the student withdraws late into the attempt, administrators attach an administrative unit status that defines treatment of the unit considering factors such as student load calculations, progression rules and grades.

A student may transfer units from a generic program to one of its specializations, as students do not normally graduate from generic programs. For transfers between programs, both the original and destination programs must be members of the same program group and transfer group type. In addition to this, in the career-centric mode, the career or careers that a student chooses would limit the choice of destination program. Transfer is also subject to any restrictions that might apply to a unit of the destination program. The destination specific program takes the same commencement date as that of the original generic program. 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.

When a new enrolled student unit attempt is added, an existing unconfirmed student unit attempt is confirmed, or a discontinued student unit attempt is reinstated, the system validates the units against institution-defined rules for co-requisites, prerequisites, and incompatibility.

An enrolled student can be transferred between programs.

Research Candidacy

The Research subsystem is used to manage the activities of students who have applied for or enrolled in a research program. The Research subsystem enable users to enter and track a student's candidacy details, supervisor details, scholarship details, milestone details, and thesis details.

A student can be pre-enrolled in a program if an offer is made by the institution and the following candidature details exist:

■ research topic

- expected submission dates

- principal supervisor

- teaching period chosen for enrollment

- the candidate's program commencement date if it is different from the default program start date

The above information is mandatory to process an application and make an offer. Research topic must exist before an offer is made. Pre-enrollment occurs automatically if the application is processed through Admissions. In Enrollments, pre-enrollment is done by running a batch job, which also pre-enrolls the returning students. For information, see Pre-Enrolling Students.

Pre-Enrolling Students

For new students, pre-enrollment creates new student program attempts taking the default funding source, fee category, correspondence category, and enrollment category mapped to the admission category. If the new student is a research candidate, research candidacy details are copied taking the proposed commencement date as the student program attempt commencement date.

For returning students who have crossed the commence cutoff date alias of their first enrollment in a program, pre-enrollment creates an eligible to reenroll record, checking if the student's enrolled program version is on offer and issuing a warning, if not, while pre-enrolling. Institutions may offer admission for an existing student enrollment program attempt when a student who has not completed the prior program attempt applies for re-admission. Or institutions may make a new admission offer in a subsequent year if the student did not respond to the offer in the previous year. In this case, pre-enrollment checks for existing student program attempts with inactive, deleted, lapsed or discontinued status, updating these records and changing the status to either inactive, unconfirmed, or enrolled.

For a new student, pre-enrollment creates an unconfirmed unit set attempt for the unit set offered in Admissions. For an existing student unit set attempt that has expired, administrators must create and add a new record to represent a subsequent attempt.

Administrators can pre-enroll students who receive offers and conditional offers in a batch and create unit attempts if a pattern of study exists for the program. A pattern of study may specify units but no location or class. As student unit attempts must include a specific unit offering, pattern of study pre-enrollment checks for available unit offerings in the pattern of study teaching calendar first by the location

specified in the pattern of study or in the student program attempts, and then by the unit class of any available mode.

Prerequisites

Enrollment category, enrollment methods, and student commencement types must be defined.

Person details must be defined.

Pre-enrollment must be defined as a valid enrollment step.

Default enrollment categories, funding source, fee category, and correspondence category must be mapped to admission categories.

For a program a pattern of study including units, unit offerings, and the number of periods to be pre-enrolled must be defined.

Statuses for student program, unit set, and unit attempts must be defined.

Rules for an enrollment category procedure must be defined.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Setup - Enrollment Category Procedure Details - Enrollment Category Procedure Detail window

Enrollments - Setup - Enrollment Category Validation Setup - Enrollment Category Validation Setup window

Program Structure and Planning - Program Offerings - Pattern of Study - Pattern of Study window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

    - Batch Pre-Enrollment Process

    - Batch Pre-Enrollment Process with Log Creation Date

Enrollments - Student Enrollments - Student Enrollments window

Enrollments - Processes - Program Attempt Administration - Program Attempt Administration window

Steps

1. In the Enrollment Category Procedure Detail window, select an enrollment category, attach the required enrollment method and define enrollment steps for the category and method.

2. In the Enrollment Category Validation Setup window, select an enrollment category and enrollment step and click Edit Rule to define rules for the validation of the enrollment step. Save your work.

3. In the Pattern of Study window, select Always Pre-enroll to override the pre-enrollment constraint of returning students completing units specified by the pattern of study to be eligible for pre-enrollment.

4. Run the Batch Pre-Enrollment concurrent process to pre-enroll returning students. Use this concurrent process to pre-enroll new students if pre-enrollment is not set up as part of admission application processing. Select student type of return to pre-enroll returning students, and new to pre-enroll new students.

   Set the pre-enroll pattern of study units parameter set to Core or Core and Optional to pre-enroll pattern of study unit sets and units.

   In the absence of enrollment categories defined for the academic calendar, or to change the enrollment category from the derived one, specify the enrollment category in the parameters window of the Batch Pre-Enrollment concurrent process before running it.

   Set a new enrollment due date, if required for the batch of students in the parameters window.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: If students are pre-enrolled through a batch job, then pre-enrollment need not be a valid enrollment step.

5. Run the Batch Pre-Enrollment concurrent process again, if a pattern of study for the program pre-enrolled is defined after creating student program attempts.

   Note: When an offer of admission is made for a program and the final unit set is not selected in the admission application, or the unit set mentioned does not belong to the Prenrl-yr system category then the Batch Pre-Enrollment process defaults the unit set with sequence number 1 to the student. This setup is done in the Unit Set Pre-Enrollment Configuration window with mapping sequence number 1 for the first year unit set.

6. Run the Batch Pre-Enrollment Process with Log Creation Date concurrent process to view the list of students pre-enrolled.

7. Access the Program Attempt Administration window via the Student Enrollments window to change the enrollment due date or enrollment category for different program attempts of a student. First query the appropriate student and program in the Student Enrollments window. Click Program Attempts and then click Administration Details to make the necessary changes in the Program Attempt Administration window. Save your work.

8. Access the Program Attempt Administration window directly from the menu to change enrollment due date, or category for more than one student and program. Query the appropriate student and program, make the necessary changes and save your work.

9. In the Student Enrollments window, query the appropriate student. Click **Program Attempts** and select Confirm to pre-enroll the student whose program data was entered directly in Enrollments. Save your work.

10. Use the Program Attempt Administration window to view the pre-enrollment history details of the student and program queried. Pre-enrollment details include calendar type, enrollment period in which the student program attempt has been registered, enrollment category of the student program attempt, and the enrollment form received date derived from self-service where the program attempt was confirmed.

   Note: Dates are displayed only when override dates are entered as parameters in the Batch Pre-Enrollment process. Enrollment package production date and enrollment form due date appears if specified in the Batch Pre-Enrollment process.

See Also

For general information on the enrollment process, see Enrollments Overview.

For detailed information on pre-enrollment, see Pre-Enrollment.

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. Administrators use preferences to determine which

programs have priority and for the program, give students with more accumulated credit points for it higher priority than the others. In the event of multiple students meeting the same criteria, administrators can specify the starting letter for an alphabetical sort.

Administrators can change timeslot duration details of a student before generating timeslots in the final mode. However administrators may manually override the number of students assigned to a generated timeslot by adding or removing students. After the generation of timeslots for a session, administrators may continue to generate new timeslots if required, for the same session.

Prerequisites

Timeslot name and period must be defined.

Program type group, calendar, and student types must be defined.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Processes - Assign Enrollment Session Timeslots - Assign Enrollment Timeslots window

Enrollments - Processes - Timeslot Assignment Results - Timeslot Assignment Results window

Enrollments - Processes - Timeslot Assignment Results - Admin - Timeslot Assignment Results - Admin window

Enrollments - Processes - Review Student Timeslot Assignments - Review Student Timeslot Assignments window

Steps

1. In the Timeslot Setup window, query a timeslot and define priorities and preferences for it. Select Assign Randomly to override if required, defined priorities and preferences for a timeslot.

2. In the Assign Enrollments Session Timeslots window, query the program type group, select the timeslot, and assign students to the timeslot. Save your work.

3. Click **Calculate** to calculate and display the number of students allotted to a timeslot and the number of timeslot durations in the timeslot session in the Assign Enrollments Session Timeslots window.

To override maximum head count displayed for the timeslot, enter a new value and save your work.

4. Select Trial and click **Submit** to view timeslot details and alter if required. Select Final and click **Submit** to generate final timeslots.

5. In the Timeslot Assignment Results window, query the appropriate program type group to view generated and to be generated timeslot details and students assigned and unassigned to a timeslot.

6. In the Timeslot Assignment Results - Admin window, query the appropriate program type group to modify timeslot details and add or remove students assigned to the timeslot.

7. Save your work.

8. In the Review Student Timeslot Assignments window, query the appropriate student to view timeslot details of the student.

See Also

For general information on the enrollment process, see Enrollments Overview.

For detailed information on timeslots, see Timeslots.

Enrolling Students

An enrolled student is one for whom there is a confirmed student program attempt, unit set and unit attempt. Pre-enrollment creates unit attempts that must be confirmed using self-service. For direct enrollment that does not use the admissions subsystem, administrators can enroll students into units or students can directly enroll into units using self-service. Enrollment validations are applied as units are added to a program attempt and when final list of units is submitted.

- Creating Program Attempts
- Enrolling Unit Sets
- Unit Attempts and Eligibility
- Waitlists and Unit Section Enrollment
- Generating Enrollment Statistics

For a confirmed program attempt, administrators must indicate primary programs in each career and a key program for the careers pursued if the institution's approach to higher education is career-centric. This mode allows a student to

pursue more than one career and multiple program 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 and in economics as part of an undergraduate career. The student must define a primary program for the undergraduate career or program type comprising two program attempts, and a key program for the two careers. All programs in a career other than the primary program become secondary programs. The primary program functionality is not required if the institution operates in a program-centric mode.

Institutions define a final graduation award for a program version comprising of several smaller awards. A student enrolls for the highest award to graduate in. The student's award aim however, may be a lower award towards which the student works. On completion of the lower award requirements, administrators upgrade the award aim to the next higher award in the program. This 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 latest completed award aim.

A program attempt consists of multiple unit sets and may include external programs needed for program completion. The unit sets that constitute the major part of the program can be defined as primary unit sets. Administrators assign unit sets to program attempts.

Administrators must set up enrollment validations for a specific term or teaching calendar used to determine if a student is eligible for enrollment. The student must clear these validations to successfully enroll into units. These include forced full time attendance, minimum credit points required and maximum credit points allowed for a program, and academic or administrative holds. Administrators can also set up special enrollment validations for a group of students defined by person ID group or enrollment category. Administrators can override validations, enrollment steps and holds, if necessary.

Creating Program Attempts

Administrators must define at least one enrollment session to enable student enrollment. This enrollment session becomes the default session taken when enrolling a student. Administrators may, if required, change the session details for a student. An enrollment record consists of basic and detailed person information and program information captured in the program attempts of the student for a career.

A student program attempt contains program details including alternate program titles, category for fees and correspondence to be used, funding source, exam

location and primary program. Program details include special requirements that are external units or unit sets that the institution may require the student to undertake outside the institution to complete the enrolled program. For example, a student studying physical education may need to complete an external course, such as the red cross first aid certificate, taken as part of the program outside the institution's regular study hours. The program attempt would include details of any advanced standing the institution may grant the student towards program completion.

For a research candidate, the student program attempt contains thesis details such as submission, scholarships, milestones, and supervisor names.

Prerequisites
Enrollment session must be defined.

Responsibility
Oracle Student System Super User

Navigation
Enrollments - Student Enrollments - Student Enrollments window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Bulk Unit Rules Checking Process

- Bulk Unit Rules Check Exception Report

- Report To Identify Double IDs

Requests - Enrollments History - Student Program Attempt - Student Program Attempt History window

Enrollments - Processes - Student Program Special Requirements - Student Program Special Requirements window

Enrollments - Processes - Student Program Attempt Award Aim - Student Program Attempt Award Aim window

Steps
1. Create at least one enrollment session in the Session Details window that opens along with the Student Enrollments window. Save your work.

In the Student Enrollments window, click **Alter Session** to change session details in the Session Details window for subsequent student enrollments. Save your work.

2. In the Student Enrollments window, enter basic person information to create a new student enrollment record. To update an existing enrollment record, use the Find Person icon and query for the appropriate student.

3. Click **Alternate IDs** to enter alternate ID of student in the Person Details window.

4. Click **Addresses** to enter student's complete postal address.

5. Click **Special Needs** to create and maintain a record of special needs of the student, in the Persons Special Needs window.

6. Click **Notes** to enter supplementary information about the student, program attempts, or unit set attempts in the Person Notes window.

7. Click **Statistics** to enter demographic details, English language proficiency, voting and income tax information, and educational goal of the student in the Person Statistics window.

8. Click **International** to enter and maintain citizenship, funding, and dependent details specific to overseas students.

9. Click **Person Details** to enter student's person type, contact information, marital status, religion, and housing status in the Person Details window.

10. In the Student Enrollments window, click **Program Attempts** to enter and maintain student program attempt details. Select the appropriate program offering and select Confirm.

    Note: The commencement date defaults to the current date. The program attempt is inactive till the student enrolls in units.

11. To confirm an enrolled program status, confirm pre-enrolled units and add and delete units as required in self-service.

12. In the Student Program Attempt window, click **Occupational Titles** to associate programs with professions and professional titles.

13. In the Student Program Attempt window, click **Candidacy** to enter research candidacy details. For information, see Setting Up Research Candidacy Details.

14. In the Student Program Attempt window, click **Advance Standing** to enter advanced standing details. For information, see Chapter 4, Academic Records, Evaluating Applications for Advanced Standing.

15. In the Student Program Special Requirements window enter unit details of the external program included in program completion.

   Optionally, in the Student Program Attempt window, click Special Requirements to enter the student's program attempt's special requirement details.

16. Save your work.

17. In the Student Program Attempt Award Aim window, query the appropriate student and enter or upgrade award aim details. Save your work.

Guidelines

The following statuses apply to a student program attempt:

- Unconfirm - when the institution admits a student in a program and the student is yet to confirm enrollment

- Inactive - when a student accepts an admission offer and confirms the intention to enroll, but has no enrolled units

- Enrolled - when the student enrolls in units for the program

- Intermit - when the institution grants the student an intermission or break in the program

- Lapsed - when a returning student fails to enroll into units within the given time frame

- Discontin - when the student withdraws from the program

- Complete - when the student finishes the program and is ready to graduate

See Also

For general information on the enrollment process, see Enrollments Overview.

For general information on program attempts, see Student Enrollment.

Enrolling Unit Sets

Students enrolled in a program must also enroll into unit sets for that program. Each unit set is a logical set of units that defines the path of study selected by the student. Unit sets may represent core units for the major, called primary unit sets, or the minor part of the program. For example, a student may enroll in economics with accountancy and banking as majors for the program.

Prerequisites

Unit sets, unit set categories, and unit set codes must be defined.

Requirement for authorization must be defined.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Processes - Unit Set Attempt - Unit Set Attempt window

Requests - Enrollment History - Student Unit Attempt - Student Unit Attempt History window

Requests - Enrollment History - Student Unit Attempt - Student Unit Set Attempt History window

Steps

1. In the Student Enrollments window, query the appropriate student record and click **Program Attempts**. In the Student Program Attempt window, select the required program and click **Unit Sets** to enter unit sets.

    Select Confirmed to confirm student's enrollment in the unit set. Select Primary Set if the units set comprises units of the major. Select Completed to enter the completion details of the unit set for which the student has satisfied requirements. Select Voluntary Ending if the student chose to voluntarily end the unit set.

    If the unit set was specified as part of an admissions offer, enter the name of the person who authorized it. Save your work.

    Note: The system inserts the current date in Selection Date. If required, administrators can backdate this to any date after program attempt commencement.

2. Click **Unit Set Hierarchy** to view the relationships between the selected unit sets.

3. Use the Find Student Unit Attempts window to search by student for the appropriate unit attempt and view the history of the unit attempt in the Student Unit Attempt History window.

4. Use the Find Student Unit Set Attempts window to search by student for the appropriate unit attempt and view the history of the unit attempt in the Student Unit Set Attempt History window.

See Also

For general information on the enrollment process, see Enrollments Overview.

For general information on unit set attempts, see Student Enrollment.

Unit Attempts and Eligibility

Students must enroll into units for a confirmed program attempt. Administrators define the validations that need to be applied to determine a student's enrollment eligibility. Some validations are applied as students add units in self-service such as maximum credit point allowed or holds while others are applied when students submit the list of units, such as attendance and minimum credit points required for program completion. If a student fails these validations, the student is denied enrollment and is notified about the failure.

If enrollment validations are set for a person ID group of international students, for example, administrators can override enrollment steps for the group. If the Students and Exchange Visitor Information System profile is enabled, an administrator must enter an authorization to override the validations of forced attendance type or final minimum credit points.

Holds restrict a student's program enrollment and completion process. Holds may be academic or administrative. For example, if a student fails a unit, an academic hold is applied, and if a student fails to pay fees, an administrative hold is applied. Administrators can override a hold for the current teaching period or release a hold for the program. Administrators release administrative holds in self-service and academic holds in the academic records subsystem.

Holds are checked as part of the student program attempt eligibility checks when the program attempt is confirmed or when a discontinued program attempt is reinstated.

Prerequisites

Person, program, and unit eligibility steps must be defined.

Students and Exchange Visitor Information System profile must be enabled.

Minimum and maximum credit points and forced attendance type must be defined as validation steps.

Authorization code must be defined for minimum credit points and forced attendance type.

Holds must be defined.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Enrollment Eligibility Override - Enrollment Eligibility Overrides window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Enrollment Eligibility Override Batch Process

Enrollments - Holds Override or Release - Holds Release/Override window

Steps

1. In the Enrollment Eligibility Overrides window, query the appropriate student record to override the person, program, and unit enrollment steps for a student.

2. Save your work.

3. Run the Enrollment Eligibility Override Batch Process concurrent process to override the person, program, and unit enrollment steps for a group of students.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: Select the program steps of final minimum credit point, final maximum credit point, or the unit step of variable credit point approval and enter new override credit points.

4. In the Student Program Attempt window, click **Holds** to enter and view academic and administrative hold details for the student in the Person Hold Details window.

5. Run the Bulk Unit Rules Checking Process concurrent process to validate unit rules for each student program attempt in a selected academic period and check if all invalid student unit attempts pass the unit rules.

6. Run the Bulk Unit Rules Check Exception Report concurrent process to view student program attempts that failed unit rule validation.

7. To view records that match exactly or partially run the Report To Identify Double IDs concurrent process.

8. In the Minimum Credit Point Query window, query the program code, term, and enrollment method type and view the students who failed the minimum credit point validation. To restrict the number of records retrieved enter one criterion. The criterion can be program location, attendance type, or attendance mode. Click **Retrieve List** to view the class list details. Click **Download Records** to download the records.

   Select Notify to enable the sending of notification to the student if minimum credit point validation fails. Click **Send Notification** to launch a workflow event to notify the student of failure in minimum credit point validation.

9. Save your work.

10. In the Holds Release/Override window, query the appropriate student record and select the administrative holds to be overridden or released.

    Note: Academic holds are overridden in Progression subsystem.

11. Save your work.

See Also

For general information on the enrollments process, see Enrollments Overview

For general information on unit attempts, see Student Enrollment.

Guidelines

If more than one authorization record exists then there should not be any date overlaps between the two records. The Authorization code cannot be updated. Instead the existing record must be close dated and a new record must be created.

Waitlists and Unit Section Enrollment

Institutions can define the maximum number of students for a waitlist, waitlist students on first come first served basis 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.

The Oracle Student System assigns sequential position numbers to waitlisted students and students can be enrolled as per the position number, by running a batch job. If administrators alter position numbers, Oracle Student System notifies students their new position numbers, automatically re-sequences the other

waitlisted students. Enrollment occurs if students pass the validations of maximum credit points, time conflict, and reserved seats.

Oracle Student System notifies administrators about waitlisted students who failed enrollment validations and administrators can then manually enroll students if required, overriding validations. Optionally, institutions may set up maximum credit points validation during enrollment to include both waitlisted and enrolled unit sections, and time conflict validation between enrolled and waitlisted unit sections to be prohibited. Administrators can also run a batch process to enroll waitlisted students into unit sections with holds, one unit section at a time.

Administrators can count waitlisted units in a student's total units for a teaching period, remove or reposition waitlisted students with time conflicts, 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.

Prerequisites

Enrollment validation of maximum credit points and time conflicts must be defined.

Waitlist options must be enabled or the maximum number of students in a waitlist defined for a teaching calendar at the institution, organizational unit, unit offering, and unit section level.

Waitlisting must be enabled at the organizational unit, unit offering, and institution level.

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Unit Section - Unit Section Details - Unit Section Details window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - List of Unit Section with Hold Status and Waitlisted Students Report

Enrollments - Unit Section Waitlist - Unit Section Waitlist window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Enroll Students From Waitlist Process

Steps

1. In the Unit Section Details window, use the Find Unit Section window to query the appropriate unit section and click **Enrollment**. In the Unit Section, Enrollment Limits, Waitlist and Reserved Seating window, define limit of students to be enrolled in the unit section. Define also waitlist options or reserved seating at the unit section level. This overrides the options set at unit offering level.

2. Run the List of Unit Sections with Hold Status and Waitlisted Students concurrent process to view waitlisted students and hold status, if any, of unit sections.

   For information on running a concurrent process, see Concurrent Process Procedure.

3. In the Unit Section Waitlist window, query the appropriate unit section, to manually re-position students in the waitlist. Save your work.

   Note: The Oracle Student System notifies students of their new position.

4. Run the Enroll Students From Waitlist Process concurrent process to enroll waitlisted students in unit sections with holds, one unit section at a time.

See Also

For general information on the enrollment process, see Enrollments Overview.

For detailed information on waitlists, see Student Enrollment.

Generating Enrollment Statistics

After enrolling students and while students are pursuing their programs administrators can generate reports on program and unit enrollments, names of students enrolled, the number of students in a program offering option and unit offering option and the number of units students attempted. Similarly, administrators can view class lists that name the students enrolled in a specific unit section.

The administrators can generate and 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 calendar specified by the administrator.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Unit Enrollment Summary

- Student List

- Student Current Enrollment Report

- Program Attendance Summary

- Student List--Unit

- Student Returning to Full Time Program Load

Enrollments - Class List Query - Class List Query window

Requests - Enrollment History - Unit Enrollment Statistics - Unit Enrollment Statistics window

Steps

1. Run the Unit Enrollment Summary concurrent process to generate a report that lists the number of units students attempted.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. Run the Student List concurrent process to generate a report that lists the students names and enrolled program details.

3. Run the Student Current Enrollment concurrent process to generate a report that lists student's program and unit enrollment details in the specified academic calendar.

4. Run the Program Attendance Summary concurrent process to generate a report that lists the number of students enrolled in a given program offering option or set of program offering options.

5. Run the Student List-Unit concurrent process to generate a report that lists the number of students enrolled in a given unit offering option or set of unit offering options.

6. To generate a report to view the 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 calendar specified by the administrator, run the Student Returning to Full Time Program Load report.

7. In the Class List Query window query the appropriate record to download a class list.

8. Use the Find Unit Sections window to enter appropriate search criteria and view statistical details of the queried unit section in the Unit Enrollment Statistics window.

See Also

For general information on the enrollment process, see Enrollments Overview.

Post Enrollment

After enrolling a student, the student's program attempt can be changed, discontinued, or reinstated. Similarly, a student's program attempt can be lapsed or set to intermission, and a lapsed student can be reenrolled.

Post enrollment includes the following tasks:

- Lapsed Program Attempts

- Intermission

- Discontinuation

- Changing Program Offering Option

- Transfer

Lapsed Program Attempts

Returning students must reenroll into a program attempt by the date the institution specifies, or else the program attempt lapses. Lapsed program attempts can be reinstated. A concurrent process can be run to view all inactive student program attempts within an academic period and to update the status of these student program attempts to Lapsed.

Prerequisites

Lapsed date aliases must be defined.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Student Enrollments - Student Enrollments window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Student Program Attempt Lapsed Process

Steps

1. Query the appropriate student record in the Student Enrollments window.

2. Click **Program Attempts**. Select the Lapsed Date tab and enter the details in the Student Program Attempt window.

3. Save your work.

4. Run the Student Program Attempt Lapsed Process concurrent process to view the program attempts Inactive status and update them to Lapsed status.

    For information on running a concurrent process, see Concurrent Process Procedure.

5. To re-enroll a lapsed student, query the appropriate student record in the Student Enrollments window and click **Program Attempts**. Select the Lapsed Date tab and delete the lapsed date in the Student Program Attempt window.

    Note: The program attempt status changes to Inactive. Add units and the program attempt status changes to Enrolled.

6. Save your work.

See Also

For general information on the enrollment process, see Enrollments Overview.

Intermission

Students can be permitted to temporarily suspend their enrollment, or the institution might temporarily suspend the students enrollment from a confirmed program. This process is known as intermission. After intermission the students can be reenrolled. Intermission is initiated only against a primary program. Intermitting a primary program intermits all secondary programs.

Prerequisites

Intermission must be a valid enrollment procedure step.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Student Enrollments - Student Enrollments window

Enrollments - Processes - Intermission - Intermission window

Steps

1. Query the appropriate student record in the Student Enrollments window.

2. Click **Program Attempts**.

3. Click **Intermission** in the Student Program Attempt window.

   Note: The end date is when the student is due to resume the program attempt. It often coincides with a teaching period.

4. Select Voluntary if the student has requested for intermission.

   Note: Clear the Voluntary check box if the intermission is set by the institution.

5. Save your work.

6. Optionally, query the appropriate student record in the Intermission window and enter the details.

7. To re-enroll a student after intermission, query the appropriate student record in the Intermission window and adjust the end date of the period of intermission.

8. Save your work.

   Note: Once the student is intermitted, a business event is raised that can be customized to notify students of the intermission.

   Note: Based on the census date the enrolled units in the intermission period is discontinued.

See Also

For general information on the enrollment process, see Enrollments Overview.

For general information on intermission, see Post Enrollment.

Discontinuation

Discontinuation is the ending before completion of a student's enrollment in a program or a unit. Discontinuation is usually initiated by students indicating that they wish to exit the program. Institutions can also discontinue students. The primary and the secondary programs can be discontinued.

In Self Service an administrator or a student can discontinue the unit attempts. If the administrator discontinues the unit attempts, business event is raised that can be customized so that students can be notified. The institution must set up the time frame in which unit attempts are considered dropped and when the unit attempts are considered discontinued. The institution must also determine whether or not a discontinued unit attempt counts towards the student's load or not.

Prerequisites

Administrative unit statuses must be defined.

Discontinuation date aliases must be defined.

Discontinuation reason codes must be defined.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Student Enrollments - Student Enrollments window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Bulk Unit Enrollment/Discontinuation

- Student Program Attempt Future Discontinuation Report

- Student Program Attempt Update

Enrollments - Processes - Invalid Unit Attempts - Invalid Unit Attempts window

Steps

1. Query the appropriate student record in Student Enrollments window.

2. Click **Program Attempts**. In the Student Program Attempt window, select the program attempt to be discontinued. In the Discontinue tab, enter the discontinuation details.

3. Save your work.

4. To discontinue unit attempts, run the Bulk Unit Enrollment/Discontinuation concurrent process.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: Students and administrators can discontinue unit attempts in Self Service.

5. To view the program attempt discontinuation report, run the Student Program Attempt Future Discontinuation Report concurrent process.

6. To discontinue a program set for a future date, run the Student Program Attempt Update concurrent process.

7. To check for students not satisfying the unit rules, query the appropriate Term/Teaching Calendar in the Invalid Unit Attempts window.

8. Select Drop/Discontinue for students whose unit attempts you want to discontinue in the Invalid Unit Attempts window.

9. Click **Submit** to commit the details and save your work.

10. To reinstate a program attempt, query the appropriate student record in the Student Enrollments window.

11. Click **Program Attempts** and select the program attempt in the Student Program Attempt window. Select the Discontinue tab and delete the discontinuation date.

12. Save your work.

See Also

For general information on the enrollment process, see Enrollments Overview.

For general information on program attempt discontinuation, see Post Enrollment.

Changing Program Offering Option

A student can request a transfer to a later program version or a change in the program location, attendance mode, or attendance type. Sometimes the academic calendar might also need to be changed if the student commences a program in one institution and continues the program in a different institution in a different academic calendar. A change or transfer in any of the above details alters the program offering option details of the student.

The institution can predetermine a forced component for a student enrolled in a program offering option. 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 # symbol. You can override this forced option.

Prerequisites

The session details and the enrollment category must include change function as an enrollment step.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Student Enrollments - Student Enrollments window

Enrollments - Processes - Program Offering Option - Change Student's Program Offering Option window

Steps

1. In the Student Enrollments window, query the appropriate student, and click **Program Attempts**. In the Student Program Attempt window, click **Program Change**. Select new options and click **Change Option**. Save your work.

2. Optionally in the Change Student's Program Offering Option window, query the appropriate student. Select the options to change and click **Change Option**. Save your work.

    Note: Validations are performed for the academic period specified in the session details window.

3. To transfer a set of students between program offering options within the same program or between program versions, run the Bulk Program Offering Option Transfer Process concurrent process.

    For information on running a concurrent process, see Concurrent Process Procedure.

Guidelines

A Student cannot be transferred to another version of the same program, which has a different program type. A change of program type implies a change in the program code.

A change in program offering option is not allowed if the program attempt status is Discontin, Completed, or Lapsed.

See Also

For general information on enrollment process, see Enrollments Overview.

Transfer

An enrolled student can request for a transfer to another program, unit, or unit sets. A research candidacy record can only be transferred to a research program. A student's unit attempts with associated grades can be transferred with the original program attempts. Before transferring, the institution might require the student to apply for entry to the new program. A destination program attempt must exist for a transfer of program attempt.

Once a student is transferred, the program attempt is discontinued, from which the student is transferred.

A set of students between unit sections within the same unit can be transferred by running a concurrent process. On successful transfer of a unit section a notification is sent to students about the unit section being transferred.

Prerequisites

Program groups must be defined.

Transfer must be a valid enrollment step and session details and the enrollment category must include change function as an enrollment step.

The original program and the destination program must be of the same program type group.

The source program and the destination program must have the same fee category.

The program must be of type designated for transfers.

The program to be transferred must have the status of Inactive, Enrolled, Discontinued, Intermission, Completed, or Lapsed

Units to be transferred must have status of Enrolled, Completed, or Discontinued.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Student Enrollments - Student Enrollments window

Enrollments - Processes - Program Offering Option - Change Student's Program Offering Option window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Bulk Program Offering Option Transfer Process

- Bulk Unit Section Transfer

Steps

1. In the Student Enrollments window, query the appropriate student, click **Program Attempts** and click **Transfer**. Enter transfer details in the Process Program Transfer window.

   Note: Access to the Process Program Transfer window depends on whether Transfer is a valid enrollment procedure step for the enrollment session and whether the user has the security privileges to perform that step. If access is not permitted, the transfer button does not appear. The program group must be of type designated for transfers, and the program attempt status must be Enrolled, Completed, or Discontin.

2. 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.

3. In the Process Program Transfer window, click **Unit Details** to transfer units. Save your work.

   Note: Units must have status of Enrolled, Completed, or Discontin to be transferred. All units in the original program are displayed and units transferred are marked with an asterisk.

4. In the Process Program Transfer window, select all eligible units or only specific units for transfer, that count towards the new program completion and click **Unit Set Details** to transfer unit sets. Save your work.

5. In the Process Program Transfer window, to finalize the transfer process, select the enrolled units and unit sets to be transferred and click **Transfer Program**.

   Note: All units or unit sets need not be selected when the initial transfer is made. Units can be transferred at a later date.

6. Save your work.

7. To transfer a set of students between unit sections within the same unit, run the Bulk Unit Section Transfer concurrent process.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: The Bulk Unit Section Transfer concurrent process generates the Bulk Unit Section Transfer exception report listing results, errors, and warnings.

See Also

For general information on the enrollment process, see Enrollments Overview.

For detailed information on transfers, see Post Enrollment.

Enrolling Research Students

The Research subsystem is used to manage the activities of students who have applied for or enrolled in a research program.

When a student applies for an admission to a research program, a candidature record is created that includes information on thesis, scholarship, milestones, supervisors, effective full time days details.

An existing candidacy record can be transferred from one research program to another research program only. To perform a transfer, candidacy record must exist in the current program. Research candidacy details can only be transferred to research program. If a candidacy record already exists in the new program, the current candidacy cannot be transferred. For information, see Post Enrollment.

If a student does not confirm the enrollment, a batch job is run, which delinks the the unconfirmed student program attempt and the candidature record, and deletes the program attempts created through pre-enrollment. For information, see Chapter 4, Admissions, Confirming Admission and Pre-enrolling.

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Research - Research Candidacy Details - Research Candidacy Details window

Enrollments - Research - Research Milestones - Research Milestones window

Enrollments - Research - Scholarship Details - Scholarship Details window

Enrollments - Research - Thesis Details - Thesis Details window

Steps

1. Query the appropriate student record to enter or modify the candidature details in the Research Candidacy Details window.

   Note: A new candidature record can be created only in Admissions or Enrollments. For information, see Chapter 4, Admissions, Creating an Application.

   Note: A candidature record cannot be deleted if it is linked to an admission application instance and if the application outcome status is Offer or Cond-Offer. Individual details can be deleted, except those that are mandatory entries, after an admission offer is made.

   Note: The commencement date cannot be altered after the student program attempt is confirmed.

   Note: A valid commencement date entry must be equal to or after the earliest research teaching period start date alias instance.

2. Click **Thesis** to enter thesis details in the Thesis Details window.

   Note: An expected submission date must be within the min and max submission date values.

   Note: A thesis that has the status Submitted or Examined cannot be deleted.

   Note: Deletion date cannot be altered, but can be cleared.

3. Optionally, you can enter the details in the Thesis Details window

4. Click **Research Codes** to enter research codes categories applicable to this candidature in the Research Codes window.

5. Click **Scholarships** to enter scholarship details in the Scholarships Details window.

   Note: Scholarship details can be entered only against an existing candidature.

   Note: If multiple scholarship details are entered, an existing scholarship type cannot be used if the applicable date periods overlap.

   Note: A scholarship type is either associated organization unit code or person ID.

   Note: Once committed, scholarship type and start date cannot be modified.

6. Optionally, you can enter the details in the Scholarship Details window.

7. Click **Milestones** to enter milestone details relating to a research candidature in the Research Milestones window.

8. Optionally, you can enter the details in the Research Milestones window.

9. Click **Supervision** to enter supervisors details in the Research Supervisors window.

10. Save your work.

See Also

For general information on the enrollment process, see Enrollments Overview.

For general information on research candidacy details, see Research Candidacy.

6

Student Finance

Student Finance manages all financial transactions and accounting activities that determine student charges and credits for a specific study period in an educational institution.

Student Finance consists of the following:

- Student Finance Overview
- Processing Deposits
- Calculating Charges and Credits
- Billing
- Working with Holds
- Applying and Reversing Refunds
- Interfacing with General Ledger

Student Finance Overview

When a student applies for admission and enrolls in a program of study at an institution, the student incurs some charges to be paid to the institution. Students can pay these charges in the form of cash, by credit cards, through sponsorship, or financial aid. All such financial transactions are processed and recorded by Student Finance in Oracle Student System.

Student Finance helps users to manage all student financial activities, from setting up fees to creating credits and charges, maintaining records and sponsorship statuses, assessing fees, generating bills, making refunds, adjusting charges, and interfacing with General Ledger.

The Student Finance overview section consists of the following:

- Processing Deposits
- Calculating Charges and Credits
- Generating Receipts
- Billing
- Calculating Finance and Late Charges
- Dealing with Refunds
- Dealing with Sponsorship
- Interfacing with General Ledger

Processing Deposits

When a prospective student submits an application in an educational institution, the student pays an admission application fee. The student finance process starts with the payment of this application fee. Later, if the student is made an admission offer, the student makes an enrollment deposit payment. The student is then enrolled in a program and the charges to be paid to the institution are determined.

Enrollment deposit payments are made over the counter and the transaction is recorded as a receipt. Institutions can transfer, reverse, or forfeit a paid deposit. Deposits can be assigned various statuses when being processed from one stage to the next. For example, a deposit paid by the student is assigned the status Cleared. This status changes to Transfer when the amount is transferred to the student's account as a credit. If the amount is forfeited by the institution, the Forfeited status is assigned. After the deposit is transferred to the credits table, it becomes a receipt. If a reversal is done on this amount, the Reversal status is assigned. Deposits are calculated as credits when transferred to the student account.

Deposits can be Enrollment or Other. 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 fall under the Other deposit category. A deposit transferred to the student account is called a deposit receipt.

Calculating Charges and Credits

For fee assessment process, the fee officer must set up data, such as accounting and fee calculation methods, credit class types, charges and credit types to be excluded from balance calculations, fee structures, fee types and categories, and fee account codes. The fee officer also defines finance and late charge calculation plans.

The fee assessment process begins with creating the charges of a student. Charges include tuition, external, and ancillary expenses. Next, the credits are created and applied to the charges to reduce the student's liabilities to zero. Credits include financial aid, sponsorship, over-the-counter (OTC) payments, deposit payments released as credit, and Oracle Account Receivables Lockbox (AR Lockbox).

While calculating the charges, if the fee assessment process needs to enter a negative charge adjustment, it creates an entry in the students credit account. For example, when fee assessment is run for the first time the total charge for a student is $100 but reduces to $80 when run for the second time as the student decides to enroll for only two units instead of three. In such cases, fee assessment process creates a credit entry for $20 in the student account to make a negative charge adjustment.

The charges applicable to each student vary and depend upon factors, such as the program and unit subscribed, number of units attempted, load, and type of attendance. For information, see Chapter 5, Enrollments, Enrollments Overview.

AR creates a customer account for every student who successfully enrolls in the institution. This account is used to transfer money from banks to Oracle Student System. A customer account has an account number, the person ID of the student, and the billing address. Typically, customer accounts are created in AR, however you can also create customer accounts in Student Finance by running a concurrent process. This is possible only if the auto-generate option in AR is disabled.

Generating Receipts

Students can make payments in cash, check, or by credit cards to reduce charges. For every payment made over the counter, Student Finance generates appropriate receipts. Receipts can also be generated using the self-service page. When charges are created on a student account, students are liable to pay the charges within a specific period of time. If these charges are not paid, finance and late charges are applied. Student Finance also enables fee administrators to waive charges when the balance is calculated for a student account. Receipts can be generated without any limit irrespective of the student's charges.

Balance is calculated automatically whenever any charge related concurrent process is run. Balances are calculated by subtracting the maximum credit limit from the maximum charge limit. Administrators can create a balance rule to exclude charges of a particular fee type or credit type, or both for balance calculation. When waiving the charges of a student, specify the period for which the charges are to be excluded. The process used to calculate holds balance or finance or late charges

then excludes the charges of the specified fee type and credit type. Charges are waived only for holds and finance and late charges calculation.

Billing

Students are periodically updated on financial transactions through bills. The bill extract contain details such as due date, cut-off date, credits paid, planned credits, and charge details for the specified billing cycle.

Due dates provide the basis of accounting aging. The due date is the date by which students must clear charges. The cut-off date is the date beyond which the bill does not reflect transactions.

Charges are calculated on the basis of the transaction date. Transaction dates refer to the exact date the transaction occurred. Whereas, credits are calculated on the basis of effective date of payment. The transactions included in the bill are marked with a bill number, bill date, and a due date.

Bills also contain mailing and remittance addresses. Mailing address are used for mailing the printed copy of the bill and institutions send printed bills to the mailing addresses. Remittance address is the address to which students send payments. A bill may have more than one mailing address, but at least one remittance address. If student has an outstanding balance and fails to clear this within a given period, holds are applied. Holds can be released on payment of balance due or in the case of a fee type hold, on payment of an overdue charge.

Calculating Finance and Late Charges

Once a charge is created on a student account, the student must pay the charge within a 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 a late charge, institutions must define a finance charge or late fee plan. While creating these plans, institutions need to specify an accrual type. An accrual type defines the method of calculating a finance or a late charge. For example, when you define a plan to levy a finance charge, you can either specify the accrual type to be calculated based on average daily balance past cut off date or average daily balance past due date. 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 and late charges.

In case of a late charge plan, you can specify the accural type to be either a flat amount or a flat rate. In addition to accrual types, institutions must obtain the rates associated with the student from the rates plan table defined during setup while

creating a finance or late charge plan. The rate is calculated by taking the daily rate multiplied by the number of days in the period. The end date is the system date or the date when the process has been run and revenue is recognized when the finance charge is created.

There is no restriction on the number of finance charge or late fee plans that can be created for a institution. Deposits are not considered for finance and late charges calculation.

Dealing with Refunds

After an institution collects the payments made by a student, it calculates the balances and determines if a student is eligible for refunds. The refunds process begins after the mass application process is executed to apply all credits to charges. Once it is established that the student does not owe anything to the institution as dues, a concurrent process is run to identify students eligible for a refund. The concurrent process then calculates the amount to be refunded and transfers the refund amount either to the student account or to the borrower.

After refunds are created, they are transferred to the refunds interface table in Student Finance through a concurrent process. Interface tables are used in Oracle Student System to import or export data from external systems. Next, the refund information is loaded into the Payable Invoice interface table and transferred to Payables table through an import program. For information, see Interfacing with General Ledger.

An important component of refund is Parent Loan for Undergraduate Student (PLUS) loan credit. 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. The borrowers can specify to which account the refund amount should be credited.

After the PLUS loan is calculated, that 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.

If case of PLUS loan credit, Oracle Student System reviews the borrower's determination and refunds that amount accordingly. Borrower's 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 might be errorneous or too small to warrant administrative cost to refund. This limit is called tolerance limit. For 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.

Dealing with Sponsorship

Sponsorship is another important form of credit for students attending universities and other educational institutions. Students can be sponsored by external bodies or corporations. Student Finance takes into account all such sponsor amounts and calculate them as credits.

Interfacing with General Ledger

Student Finance is closely integrated with Oracle Financials. If the institution installs Oracle Financials, 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.

A data framework is created for each fee period within an institution's financial year. This framework can be rolled over from year to year and modifications can be made as required. Fee processing follows a cycle based on a fee period. When the set up data is entered, the fee administrator can use this data to view the student account, assess, adjust, and disburse fees and charges, accept payments and record receipts, process refunds, and answer queries.

Student Finance also enables students to make payments online through self-service interface for ordering transcripts, verifying account details, and printing receipts of the transactions.

Figure 6–1 shows the process by which Student Finance deals with the charges and credits of a student, calculates refund, applies and releases holds, and interfaces with General Ledger.

Figure 6–1   Student Finance Process flow

Student Finance subsystem is basically used to define data for fee processing. Once the data framework is established, little additional data entry is required. Daily work mainly consists of running and monitoring concurrent processes, and using a small number of windows to query and enter fee related adjustments to individual student records.

Processing Deposits

When a prospective student is made an admission offer and the offer is accepted, then the student must pay an enrollment deposit. The amount to be paid is defined in the Admission subsystem. See Chapter 4, Admissions, Confirming Admission and Pre-enrolling.

Student must pay or clear deposits before administrators transfer, forfeit, or reverse them. A deposit is transferred as a credit to the student account after the student has successfully enrolled into a program. Student Finance verifies that the program type in the admission application form matches the program type enrolled in. If they match, the amount is transferred or else forfeited. However, institutions have the flexibility to define a setup in the Admission subsystem, that allows the deposit to be transferred to the student account even if the student enrolls into a program other than for which the admission application was created.

Enrollment and Other deposits are transferred as credits to student accounts through a concurrent process or manually. After a deposit is transferred, the status of the deposit changes from cleared to transferred.

An enrollment deposit paid by a student acts as token of commitment that the student would join the institution when offered admission. However, if the student fails to enroll in the academic term and program specified in the admission application form, the deposit amount is forfeited. A deposit can be forfeited only if it is of the type Enrollment or Other with cleared status. 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.

A deposit can also be reversed. Deposit reversals can happen if the deposit is transferred in error. When a deposit is transferred to credits, it becomes a receipt on the student account. For information, see Calculating and Applying Credits.

A deposit receipt can be of different credit class, credit instrument, and status. The credit class of a deposit receipt is determined by the type of deposit made, such as Enrollment and Other, or Payments. The credit instrument is determined by the mode of payment, such as check, cash, or credit card and the status assigned can be cleared, transferred, forfeited, or reversed.

Each deposit receipt is attached with the corresponding admissions application ID to keep a track of the deposit payment status of each admission application. This ID is the source transaction number. So, when the student makes an enrollment deposit, the application ID number is assigned as the source transaction number by default. For deposits of type Other or Payment, select the source transaction number from the available list of values.

In addition to source transaction number, deposit receipts are also assigned a source transaction type to determine the type of deposit made. When a student makes a deposit of type Enrollment, the source transaction type defaults to Admissions. For deposits of type Other and Payments, you can select the source transaction type from the available list of values.

Given below is a list of credit classes, statuses, and the way reversal works in each case.

For a deposit of the type payment:

- the status of the transferred credit changes from Cleared to Reversed

- the transferred credit transaction is removed

- the status of the receipt changes back to Cleared from Transferred

If the enrollment or other deposit is paid, then:

- the status of the receipt changes from Cleared to Reversed

- the transaction is removed

If an enrollment or other deposit is forfeited, then:

- the status of the receipt changes from Forfeited to Cleared

- a new transaction record is created with a negative entry

After a deposit is made over the counter, it is recorded as a receipt and then transferred to include it as credit in the student account. Deposits are transferred by running a concurrent process or manually using the Receipts window.

Prerequisites

Enrollment amount must be defined in Admissions.

Fee type of enrollment must be defined in the Admission Fee Information window.

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Process Student Deposits

Student Finance - Receipts - Receipts window

Steps

1. To evaluate deposits made by a student for transfer and forfeiture, run the Process Students Deposit concurrent process. This process evaluates enrollment and other deposits.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To create a deposit manually, select the appropriate credit class, party number, receipt number for the payment deposit, currency, and amount in the Receipts window.

   Note: If Oracle Receivables is installed, then the currency defaults to the currency specified in the System Options window. Also, you cannot create a credit manually with the credit instrument as Deposit. You must transfer a deposit to calculate it as a credit on the student account.

3. Select the appropriate value if the deposit type is Other and Payment.

   Note: In case of enrollment deposits, the source transaction type defaults to Admission. Also, if the application type in Admission subsystem does not have the enrollment requirement criteria level defined, then while processing the student deposit, the default enrollment requirement criteria would be taken as Application only.

4. Save your work.

5. Click **Transfer** to transfer a deposit to the student account and to override any validation with respect to enrollment requirement. Enrollment validations check if the student has enrolled in the academic calendar and program specified in the admission application form.

6. Click **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.

7. To forfeit or reverse a deposit, click **Actions....1** in the Receipts window. This displays the Receipt Actions window.

8. In the Receipts Action window, select Forfeit in the Deposit region to forfeit a deposit account.

9. Select Reverse in the Receipt Actions window and then click **OK** to reverse a deposit. You can add comments and reason for reversal in appropriate fields.

10. Save your work.

Guidelines

The different statuses of deposits are:

Cleared - when a student pays a deposit

Transferred - when a deposit is transferred to student account

Forfeited - when the institution forfeits the deposit as per institution's business policies

Reversed - when the deposit is again made available either for forfeiture or transfer

See Also

For general information on Student Finance, see Student Finance Overview.

For general information on credits and receipts, see Calculating Charges and Credits.

For information on credit class, credit types and credit instrument, see the guidelines in Calculating and Applying Credits.

Calculating Charges and Credits

In Student Finance, charges are transactions that increase a student's outstanding balance. Credits are transaction that reduce or eliminate a student's balance.

- Creating and Calculating Charges

- Calculating and Applying Credits

Examples of charge categories are:

- Educational: tuition, fees

- External: parking fines

- Ancillary: housing, meals

Credits are payments made by students to reduce the charge amount to zero. Credits can be in the form of cash, checks, credit cards, through self-service payments, and over-the-counter (OTC) receipts. In addition, credits also come from disbursement outside the Student Finance subsystem, such as sponsors.

The calculation of charges begins with fee assessment to determine the fees applicable to students, calculates the relevant amounts, and stores this information as a debt the student must pay.

In addition to the regular fee assessment rates, institutions also specify contract fee assessment rates. Contract fee assessment rates refer to those rates that apply to individual students for whom the the institution agrees to assess fees at a different charge rate.

Before you start the fee assessment process, you might want to modify the values for the following setups, if required. Typically, institutions review these setups once or twice a year of every term to ensure that they have reflected the proper fee types and if the rates have changed.

■ Fee type - A fee type defines the heads under which an institution charges its student. Examples include tuition, lab-fee, and general service fee.

■ Fee Category - describes a set of fee payable by a student for a program attempt. A student is assigned a fee category through the Admissions or Enrollment subsystem when applying for admission to the institution or enrolling in the institution. In the Student Finance subsystem, a fee administrator sets up fee types and fee categories and assigns fee types to the categories. One fee type can be included in many categories. A single fee type within a fee category is a fee liability. The fee assessment process matches students and fees by matching fee categories.

■ Fee period - periods of time set up for fees to be assessed for students enrolled in those periods; also referred to as fee calendar instance or fee assessment period.

■ Fee Type Calendar Instance - enables you to define the start and end date alias, account hierarchy, and rule sequence number.

■ Fee Category Calendar Instance - enables you to define the status of the fee category, the start and end date, and the retro active date alias.

■ Fee Assessment Rates - enables you to specify the charge rate for fee assessment for a given calendar type.

Creating and Calculating Charges

The fee assessment process begins with calculating the charges for a student by running a concurrent process. This concurrent process can be run in four modes: actual, predictive, initial, or combined. When run in the actual mode, the concurrent process calculates the charges and credits of a student based on the program for which the student is enrolled. Fee assessment is run in the predictive mode if a student is yet to be enrolled to a program. Fee assessment in the predictive mode takes into account the charges and credits for student with unconfirmed or inactive status.

Fee assessment in the initial mode is done to calculate the charges even before an actual registration of the student in a program. This mode of fee assessment typically applies to students who plan to reenroll for the same program or a higher degree program. Fee assessment in the initial mode is done using the student's prior enrolment details.

Fee assessment in the combined mode is done to determine if the student has any actual registrations done. If not, the initial mode is carried out on the basis of the sub-processing type (initial prior, initial default, and initial prior with default).

Institutions can define three different fee calculation methods for fee assessment: assess by program, assess by career, and assess by primary career. If the assess by career fee calculation method is set in the system, then for different careers in which the student registers, only primary programs in all those careers will be assessed. If the primary career fee calculation method is set in the system, then only the key program is assessed. For any student there can be only one program set as key program in the system.

If the institution defines the access by career or access by primary career fee calculation methods, then the predictive assessment parameter is not available for selection for fee assessment. The predictive fee assessment mode is only available to fee calculation methods when the calculation method is set to assess by program method.

After running the concurrent process for assessing fees, you must run the concurrent process to import the external and ancillary charges of a student. You can do this either by running a concurrent process or by entering the charges manually. After calculating the ancillary and external charges, you can view the account and charges history. In addition to creating charges, you can also specify waivers applicable for a student. The waivers can be set for the balance type of fees, and holds. Charges created can be waived for the process of finance late fees and holds.

While importing and calculating ancillary charges, you might encounter errors. These errors can occur if ancillary rates are not set up for a combination of ancillary attributes imported and if the imported date items, such as fee type and fee calendar are not valid. You need to resolve all such errors before continuing. After you have corrected the errors, you can run the a concurrent process again so that it calculates properly without errors. Next, you can run the concurrent process to calculate finance and late charges. For information see, Ancillary Attribute, Calculating Charges and Credits.

Before you start calculating the charges, you can modify the fee type, ancillary segments, rates, fee categories, and fee category calendar instances to suit your requirements.

Prerequisites

System Options must be defined.

Fee types, ancillary segments, ancillary rates, fee categories, and fee category calendar instances must be defined.

Application hierarchies must be defined.

Credit type and credit class must be defined.

Fee calendar instance must be defined.

Load calendar relationship and program attendance type must be defined.

Profile for US based universities must be defined as derivative.

Responsibility

Oracle Student System Super User

Navigation

Student Finance - Setup - Fees - Fee Types - Fee Types window

Student Finance - Setup - Fees - Fee Category Calendar Instance - Fee Category Calendar Instance window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

    - Process Fee Assessments - Landscape

    - Import and Calculate Ancillary Charges

    - Finance and Late Charges

- Import External Charges Process

- Process Fee Assessments From To Do Entries

Student Finance - External Charge - External Charges window

Student Finance - Account Summary - Account Summary window

Student Finance - External Charge - Waiver Details window

Student Finance - Ancillary Charges - Ancillary Charges window

Student Finance - Ancillary Charges Error Resolution - Ancillary Charges Error Resolution window

Student Finance - Account Summary - Account Summary window

Steps

1. To setup the fee type calendar instance, in the Fee Types window, query the fee type and modify the system fee trigger category, if required.

2. Click **Fee Type Calendars** to setup account hierarchy, start, and end date aliases to setup fee type calendars.

3. In the Fee Type Calendar Instances window, click **Retention Schedule** to setup date alias, retention percentage or amount, and schedule and then click **Assessment Rates** to setup the charge rate for a fee type. You can set up a single flat rate for a fee to be charged if a student's load falls within a specific load range.

4. Click **Element Ranges** to setup the element range for a fee type. For fee types with a charge method of Eftsu, Credit Point, or Charge Per Unit, rates entered in the Fee Assessment Rates window can be assigned to element ranges entered in the Element Ranges window. You can access the element ranges window only if the existing charge method is set to credit point or charge per unit.

   Note: You cannot access the Element Ranges window if the existing charge method for the fee is Flatrate.

5. Click **Accounts** to enter the revenue segment name and value in the Revenue Segment tab. Enter the receivable and retention flexfield value in the Accounts tab. The receivables, revenue and retention is enabled only if Oracle Receivables is not installed.

   Note: The revenue account used for retention is different from the normal revenue account and is defined separately in the Fee Type Accounts window.

This can be a GL account flexfield or an account code defined in the Fee Posting Accounts window.

6. Click **Ancillary Rates** if the system fee type is ancillary to define ancillary rates and segments.

   Note: You can set the ancillary rates only if the system fee type is ancillary. You can define the system fee type while setting up a new fee type.

7. Save your work.

8. In the Fee Category Calendar Instance window, enter a fee category name and assign a calendar instance to it. Next, specify the start and end date alias and then click **Fee Liabilities**.

   Note: The fee type must have the fee trigger type as program.

9. In the Fee Category Fee Liability window, enter the fee type, fee liability status and then click **Fee Triggers** to setup program type, program group, and program fee triggers.

10. Save your work.

11. Run the Process Fee Assessment - Landscape concurrent process to calculate all the tuition charges. This process creates only the tuition charges for a student. Enter the fee assessment period in the Parameters window. The other fields are optional. The processing mode can be changed in the System Option window.

    For information on running a concurrent process, see Concurrent Process Procedure.

    Note: In case the assessment process is run in either the Combined or Initial mode, then a predictive assessment cannot be carried out. Also, if an initial assessment needs to be done, then the effective date must be equal to system date. Further, to specify the fee category and the course commencement date, 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.

12. Run the Process Fee Assessments from To Do Entries concurrent process to 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 used for the initial fee assessment run of a fee period, and needs to be scheduled to run nightly.

Note: Students with program attempt statuses of Discontin, Completed, or Intermit can be enrolled during part of the fee period, and the date when a student discontinues enrollment is checked. A completed enrollment is fee assessable if the census date of its teaching period falls within the fee period. See Chapter 5, Enrollments, Student Enrollment.

13. In the External Charges window, query the person number and select the required fee type, fee calendar, and GL date. 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 date. 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. See, Interfacing with General Ledger.

14. Select the appropriate receivables and revenue account flexfield details.

    Note: Administrators need to manually enter receivables accounting details if the information is not defined either in fee type or System Options window. In case of revenue accounting information, manually entry is required if the information is not defined in the accounting entities windows (program, unit, unit section, organization, location, and system options). Also, revenue accounting information is derived even if receivables accounting information is not derived. This is true whether Oracle Financials is installed or not.

15. Save your work.

16. In the Account Summary window, query the person name and click **Charges History** to view the student's financial charges.

    Note: Only fee types with system fee type of external are available.

17. Click **Waiver Details** in the Charges History window to waive charges for a student account or to create a new waiver. Enter the waiver details, such as the balance type, the start and the end date.

18. In the Ancillary Charges window, manually select or query the person number and then select the required fee type and calendar type. For information, see Creating and Calculating Charges.

19. Run Import External Charges Process concurrent process to import all external charges. Enter the person number, fee type, fee calendar, and fee calendar instance. For information, see Creating and Calculating Charges.

20. On running the Import and Calculate Ancillary Charges concurrent process, if you encounter errors, you can retrieve these errors using the Ancillary Charges Error Resolution window. Enter the person number, ID type, fee type and fee calendar. In the Ancillary Attributes region, enter the date and the ancillary attributes to map it to the rates and the imported data items as defined in the attributes during setup. Error messages can be viewed in the Error text section. Run the process again for the changes to take effect.

21. After all the charges are applied, run the Calculate Finance and Late Charges concurrent process to determine the finance and late charges to be paid by the student. Enter the party number, person ID group, plan name, batch cut off date, batch due date, fee period and click **OK** in the Parameters window.

    Note: You need to run the Holds Conversion concurrent process to calculate the latest balance rules defined. This is done to ensure that the latest balance rules are applied for calculating holds.

22. Save your work.

23. Click **Account History** in the Account Summary window to view the student's financial transaction history.

Guidelines

While running the fee assessment process, if the effective date is not specified, then the fee assessment process will be executed in current mode. In such cases, fee assessment is run for students with current program attempts. However, if you mention 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 will assess the fees for students with program attempts as on the past effective date specified.

Also, institutions within 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 limit attached to it. Now, if the accumulated attendance type of the programs selected sums to full time, then fee assessment would calculate the charges for full time attendance.

See Also

For general information on Student Finance, see Student Finance Overview.

For general information on charges, see Calculating and Applying Credits.

For general information on waitlisting, see Chapter 5, Enrollments, Waitlists and Unit Section Enrollment.

For general information on units and unit sections, see Chapter 2, Program, Structure, and Planning, Program Structure and Planning Overview.

Calculating and Applying Credits

Credits, refer to transactions that decrease a student's outstanding balance. Credit transactions include creating receipts, entering credit card details, checking credit history, applying/unapplying credits to charges, and reversing charges.

Examples of credit categories are:

- Over-the-counter (OTC): cash, check, and credit card

- Mail-in payment: check, money order

- Self-service/Online: credit card

- Financial Aid credits: credits from Financial Aid subsystem

- Sponsor payments: Credits from Sponsorship Setup and student sponsor relationship

- AR lockbox: data comes from Oracle Account Receivables

- Deposits payments: realized as credits on the student account only when transferred

For payments made over the counter or through the self-service window, 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.

Credits are applied to charges based on an application hierarchy that indicates the priority in which credits are to be applied to charges. For example, within charges of the same fee type, institutions apply credits to the oldest charges first and the current charges last.

Applied credits can be unapplied or 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.

In addition to creating receipts, you can also assign the credits received to the students external charges, such as library fees and parking fines. Once the charges

of the student are entered, run the Mass Application process to apply credits to charges.

The Mass Application concurrent process creates the credit side of the account for the application record that is obtained from the debit side account of the charge transaction involved.

Before calculating the credits, you can modify or add credit type definitions as per your requirements.

Prerequisites

Fee types, Ancillary segments, Ancillary rates, and Fee categories must be defined.

Credit types must be defined.

Charges must be created.

Application Hierarchy must be defined.

Responsibility

Oracle Student System Super User

Navigation

Student Finance - Setup - System - Credit Type - Credit Type window

Student Finance - Account Summary - Account Summary window

Student Finance - Receipts window

Student Finance - Request - Student Finance History - Funding Source - Funding Source History window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Mass Application concurrent process

Steps

1. To modify the existing credit type, query the name field and enter or modify the credit class and the debit, credit, and forfeiture flexfields.

2. Save your work.

3. Query the person name in the Account Summary window and click **Create Receipts** to enter credits for a student.

4. In the Receipts window, enter the receipt number, receipt date, GL date, credit class, type, instrument, and the amount to be credited in the Amount field. To

create receipts using cash, check or credit, enter the appropriate credit instrument type in the Credit Instrument field.

5. Save your work.

6. In the Credit Card region, enter the credit card details if the student makes a payment using credit card. If the payment is made by check, enter the check number.

7. Save your work.

8. In the Account Summary window, click **Credits History** to view the schedule of student's actual and planned credits.

9. Click **Create Receipts** and then click **Actions...1** to display the Actions window.

10. 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.

11. Save your work.

    Note: 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.

12. 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.

13. 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.

14. Click **Reverse** in the Credit Reversal window to reverse accounting entries of original receipts. Enter the credit number, the credit amount to be reversed, the reversal date, and the reason for reversal in the Credit Reversal window.

15. Save your work.

16. Click **Print Receipt Online** to print the receipt.

17. Run the Mass Application concurrent process to apply the credits to the charges.

For information on running a concurrent process, see Concurrent Process Procedure.

18. To view the funding source details of a student, query the appropriate student record in the Funding Source History window.

Guidelines

Given below is a description of credit categories:

- Credit Class: This category consists of two parts: Payment and Enrollment deposit and Other deposit. Payments refer to all credits a student incurs on successful admission to the university. For example, credits levied on a student during the normal admission procedure.

  Deposits made for ancillary facilities, such as housing, meals, and parking, are termed as Other deposit. Tuition fees are not calculated in the Other deposit category.

- 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.

See Also

For general information on Student Finance, see Student Finance Overview.

For general information on credits and their types, see Creating and Calculating Charges.

For information on converting deposits to credits and receipts, see Processing Deposits.

For information on AR Lockbox, see Interfacing with General Ledger.

Billing

When a student is enrolled in an institution, charges are created for the student and credits applied to these charges. The credits can be cash, checks, credit card payments, or financial aid from sponsors. As the charges and credits reflect against a student's account in the system, it is necessary to generate periodical statements

containing transaction details on such charges and credits. The student finance subsystem assists the institution in creation of a bill through the bill extract process. The billing extract report also contains details of planned credits and deposits.

To generate bills for students, you first need to run a concurrent process which extracts actual charges and credits from the Student Finance system and displays them for viewing. Bills are printed in the desired format defined by the institution and the billing information is displayed online.

Prerequisites

Profile setting for remittance address must be defined.

Address for a person must be defined.

Local institution must be defined.

Charges and Credits must be defined.

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Billing Extract Process

Student Finance - Account Summary - Account Summary

Steps

1. Run the Billing Extract Concurrent Process to update the bills for a batch of students. Alternatively, you can run the Billing Extract Concurrent Process for a specific student.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. Query the appropriate person number in the Account Summary window.

3. Click **Billing History** in the Account Summary window to view the billing details generated.

Guidelines

Prior to running the Billing Extract Concurrent Process, you need to ensure that a transaction occurred in the form of payments and Credits are recorded.

See Also

For general information on Student Finance, see Student Finance Overview.

Working with Holds

When a student fails to pay dues within the specified time, administrators apply a hold to the student's account which prevents the student from using administrative services, such as claiming refunds, ordering for transcripts, or receiving study material.

Holds can be academic, administrative, or a combination of both. Institutions also define restrictions to be imposed for a hold category. Student Finance deals only with administrative holds. For information on hold types, see Chapter 3, Applying Outcomes, Persons.

For applying a hold, a hold plan has to be defined. The holds process considers the the criteria defined in the hold plan, such as hold level, hold type, and threshold amount or percentage to apply hold on a student.

A hold plan is defined at two levels: fee type and student account. At the fee type level, individual fee type charges are considered, while at the student account level, the current hold balance is considered.

A hold plan is applied based on a hold balance. A hold balance is the amount available in a student's account after deduction of all charges at a given date. If the holds balance is above the threshold limit, then a hold is applied. The holds balances of a student are updated in real-time, based on the latest charges and credits transactions of a student.

Apart from hold plans, fee administrators also can define a threshold amount or a threshold percentage against which the holds balance is calculated. The holds threshold amount and holds threshold percentage are tied to a hold plan and are mutually exclusive. If neither of them is specified, then no hold plan would be saved.

Administrators may apply one or more administrative holds on a student account. For instance, you can apply a hold that prevents all refunds, another hold to block all study material and so on. 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.

A hold applied to a student account can be released if the student pays the balance due or credits are applied to existing charges that push the balance below the threshold limit. Credits in the form of OTC Receipts, online payments or Financial Aid credits causes a hold to be released.

Institutions change their balance exclusion rules from time to time. In Student Finance certain fee types can be excluded from the balance rules. This makes it necessary to reassess the balance in Student Finance and determine it's affect on holds and late fee and finance charges. This is done by running a concurrent process and is typically run when a new balance rule is defined.

You can run a concurrent process to apply holds to all student accounts with hold balances below the threshold limit. You can also apply holds by querying individual student accounts. 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 the holds balance drops below the threshold limit.

Prerequisites

Hold plans and fee types must be defined.

Responsibility

Oracle Student System Super User

Navigation

Student Finance - Account Summary - Account Summary window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

   - Holds Conversion Process

   - Process Application of Finance Holds

   - Process Release of Finance Holds

Steps

1. Run the Mass Application concurrent process to update the charges and the credits transaction.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. Run the Holds Conversion Process to calculate holds based on a newly defined balance rule. Enter the conversion start date.

Note: The Holds Conversion Process is typically run for a new balance rule to take effect. The conversation start date must be same as the system date or less then the system date.

3. To apply a hold manually, in the Account Summary window, query the person number.

4. Click **Holds** in the Account Summary window to apply hold to the particular student.

5. In the Person Holds Details window, select the administrative radio button. Select Include Expired Holds, if you need to apply holds that were released and assigned an expiry date.

6. Select the hold type, the appropriate term, and select the start and the expiry date.

   Note: The term date cannot be earlier than the current date.

7. Save you work.

8. 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.

   Note: You cannot add new effects for expired hold types.

9. In the Person Holds window, click **Hold Effects Maintenance** to add or delete hold types.

10. Save your work.

11. To apply holds to a batch of students, run the Process Application of Financial holds concurrent process.

12. To manually release a hold, in the Account Summary window, query the person number and then click **Release Holds** to release the hold manually.

13. To release holds for a batch of students, run the Process Release of Finance Hold concurrent process.

Guidelines

Different types of administrative holds effects can be:

- Stop Refunds
- Block Material

See Also

For general information on Student Finance, see Student Finance Overview.

Applying and Reversing Refunds

Before applying refunds, institutions must identify students eligible for refunds. This is done by running a concurrent process that automatically identifies the student and calculates the appropriate refunds. You must apply refunds manually if any of the following is true:

- 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 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

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 a hold needs to have the hold released prior to any refund transfer. For information, see Chapter 3, Applying Outcomes, Persons and guidelines in Working with Holds.

Refunds can also be reversed after the refund 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.

All refund transactions are recorded in Account payables. When the refund assessment process is run weekly, a credit balance is imported to the Payables open interface tables. The refund amount is placed on the student account and a record is created in an import file that is transferred to Payables through the Payables open interface tables.

When Account Payables creates a electronic invoice or voucher, it also captures the student attributes, such as the voucher number and date, the check number and date, and payee or supplier information. Next, the information is exported from Payables back to Student System.

To calculate the refunds, you must first run the batch process to apply all credits to the charges. Next, you need to run the batch process to calculate the refunds for eligible students. This is followed by manually applying refunds in cases where the automatic batch process does not hold good.

Prerequisites

Fee types and account codes must be defined.

Refunds setup in the system option must be defined.

Refund tolerance setup and borrower details must be defined.

Borrower must be defined as a vendor in Account Payables.

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

    - Mass Application Process

    - Process Refunds for Excess Credits

    - Transfer Refunds Information to Refunds Interface

Student Finance - Refunds - Refunds window

Student Finance - Borrower Details - Borrower Details window

Steps

1. Run the Mass Application concurrent process to apply all available credits to the charges.

For information on running a concurrent process, see Concurrent Process Procedure.

2. Run the Process Refunds for Excess Credits concurrent process to identify students eligible for refunds and to calculate the refund amount.

    Note: If the student is inactive then no automated refund is done. Also, if the student is assigned the study abroad INTERMIT status with the intermission type attached, and study at another institution selected, then no automated refund is done by this process.

3. To calculate refunds manually, enter or query the person number and 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.

    Note: The payee number corresponds to a parent record. You cannot create refund transaction without a parent record. Payee name can be same as student or different in cases where the PLUS Loan refund is given to borrower or a foreign school is given the student's refund if the student plans to study abroad.

4. Enter the debit and the credit flexfield account numbers and codes, in the Accounts tab. The information in the debit and the credit fields is picked from the accounting information set in System Options and can be overridden.

5. Save your work.

6. In the Borrower Details window, query the person number. The borrower's details are displayed by default in the Borrower Details region.

    Note: 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.

7. Save your work.

8. To reverse a refund, in the Refunds window, enter or query the appropriate person record 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.

9. Run the Transfer Refunds Information to Refunds Interface concurrent process to load refund information into the refunds interface table.

Guidelines

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, see guidelines in Interfacing with General Ledger

- 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 general information on Student Finance, see Student Finance Overview.

Interfacing with General Ledger

Student Finance is closely integrated with Oracle Financials. Oracle Financials consists of three main components: Oracle Receivables, Oracle Payables, and Oracle General Ledger. Oracle Receivables maintains an account of all revenue transactions. Oracle Payables keeps track of payments going out, and General Ledger is the central account ledger which maintains accounting information and transactions from all associated applications, including Student Finance.

Student Finance interacts with General Ledger through the GL interface. Oracle Student System is setup as a sub-ledger to General Ledger. Student Finance posts all the charges and credits of a student to 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 Account Receivables system.

GL interface has two salient features. First, with every charge, credit, and application transactions created, a GL date is attached. 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 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.

You can transfer all the credit, charge, and application transaction details to GL by running a concurrent process only if Oracle Financials is installed. The process first checks for the accounting method installed. If the accounting method is accrual, it collects transaction data from the credit, charge, and application tables. However, if the accounting method is cash, the process collects only the credit and the application transaction details and not the charge details.

Sometime 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 has a GL date and falls 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 a open period in GL.

For 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 could either be summary or detail.

The 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.

Apart from General Ledger, Student Finance interfaces with another external application called Oracle Account Receivables (AR). AR processes lockbox receipts and transfers them to OSS through the credits interface table.

Students typically mail payments to banks, which update their accounts at regular intervals and provide AR with computer files detailing about the receipts. These details are stored by AR in a lockbox and are also called lockbox receipts.

Fee administrators need to run a batch process to transfer the AR lockbox transactions to the credits interface table in OSS and then run another batch process to import all credits details to Student Finance for viewing. If any transactions fail to get posted to GL, a un-posted transaction report is generated.

Prerequisites

Customer Accounts (Party ID) must be defined in Oracle AR.

Systems Options must be defined.

Lockbox must be defined in AR and System Option in Student Finance.

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- General Ledger Interface Process

- Import AR Lockbox Transactions

Student Finance - Account Summary - Credit History window

Steps

1. If 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 accounting method, 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.

2. If GL is not installed, run the Posting Interface process to post the transactions to a non Oracle Account Receivables system. Enter the start GL date, end GL date and GL posted date.

3. Run the Import AR Lockbox Transaction concurrent process to import the credit details from the credits interface table and reflect it in the Credits History form. Enter the Lockbox number, the credit instrument, and the credit type.

   For information on running a concurrent process, see Concurrent Process Procedure.

Note: The Import AR Lockbox Transaction concurrent process is only valid. This process is only valid when Oracle Financials is installed. Also, when Import AR Lockbox transaction process is executed, credit records are created in the credits table with the same date as the AR Lockbox receipt date.

4. To view the transaction details, click **Credit History** in the Account Summary window.

Guidelines

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

See Also

For general information on Student Finance, see Student Finance Overview.

For information on external and ancillary charges, fee assessment process, and charges concurrent processes Calculating Charges and Credits.

For information on the Import and Calculate Ancillary charges concurrent process, see Creating and Calculating Charges.

For information on refunds, see Applying and Reversing Refunds.

7

Financial Aid Management

Financial aid management includes the processing of applications for financial aid, assessing the need for aid, awarding available funds to needy students, and disbursing the funds. Financial aid provided to students could be grants, loans, scholarships, or work-study funds.

This chapter contains the following sections:

- Financial Aid Overview
- Financial Aid Applications
- Verifying Financial Aid Applications
- Need Analysis
- Administering Student Awards
- Administering Student Sponsorships
- Administering Pell Grants
- Administering Loans
- Student Employment
- Disbursements

Financial Aid Overview

Financial aid management includes processing applications for financial aid and awarding available funds to eligible students. Financial aid includes government funded grants (e.g. Pell), loans (e.g. Stafford, Perkins), and student employment programs (e.g. Federal Work Study). Also included are sponsorships, also known as third-party billings, and scholarships.

Financial aid is organized into:

- Application Processing
- Award Processing
- Disbursements

Application Processing

Application processing in Oracle Financial Aid enables institutions to receive, review, and process applications for financial aid. Institutions import financial aid application records from the U.S. Department of Education, College Scholarship Service (CSS) PROFILE records from the College Board, and institutional applications submitted by the students directly. Institutions review and verify the applications, determine the need, and transmit corrections to the U.S. Department of Education. Application processing includes corresponding with the applicant, comparing Institutional Student Information Report (ISIR) data with data obtained from documents.

Schools use various methods to identify students interested in financial aid. Students can register during recruitment or admissions activities or submit a financial aid application through external agencies. These applications are usually processed electronically. The U.S. Department of Education collects data through the Free Application for Federal Student Aid (FAFSA). Data is sent to the school in an electronic format so that it can be easily used for further processing and calculating financial aid.

The financial aid base record is a link between various application processes in financial aid management, tracking the processing status of a student, and the results of the various application and awarding processes.

Each student in Oracle Student System can have only one base record for each award year or processing period.

If a base record already exists, application processing updates the record with the admission status and date, enrollment status and date, grade level, grade type, and grade level date.

If a base record does not exist the following occurs:

- A new financial aid base record is created.
- Application processing loads partially-matched ISIR records into respective tables and the partially-matched ISIRs are held in a table waiting for a manual review.

Records are matched on the basis of record matching criteria defined for this purpose.

Data on the ISIR can affect the student's eligibility for financial aid. The federal processor checks the student's data against additional federal databases. Institutions must monitor flags selected on the ISIR for data matches. Data matches such as Immigration and Naturalization Service (INS), Social Security Administration (SSA), Department of Veterans Affairs (VA), Selective Service, or the National Student Loan Data System (NSLDS) can affect eligibility for federal aid. A student can be considered ineligible for aid based on this data and is required to supply additional materials proving eligibility, or the funding can be limited due to aggregate borrowing. Additionally, you can make corrections based on the collected data. You can also monitor changed ISIR data that can affect a student's eligibility for federal funds.

To provide you with an indication of a student's current status in Oracle Student System and to facilitate processing, application processing maintains the status of the individual student.

Award Processing

Application processing includes tracking to-do items and verification to-do items, to ensure that the data provided by the student is supported by documents.

Student's eligibility for aid is assessed on the basis of cost of attendance (COA) and expected family contribution (EFC). Calculation of COA is done based on a list of items defined in the system. Each student is assigned a set of items depending on the units and attendance type they enroll for.

Expected family contribution is calculated as per the U.S. Department of Education's formula, which may change from one year to another.

When a student's cost of attendance is modified, the student's need for financial aid is re-calculated and is updated in the financial aid base record. The awarding process takes into account the modified need value.

Award processing involves providing various funds to the students based on their eligibility and need, subject to the constraints defined for each fund in Fund Manager.

Award groups can be used in the awarding process. Award group code can be specified as an optional parameter while running the awarding concurrent processes, and the process awards the specified fund to students belonging to that award group. When a student is specified for the awarding processes, the rules defined for the group to which the student belongs are applied.

Figure 7–1   Functional flowchart of financial aid management
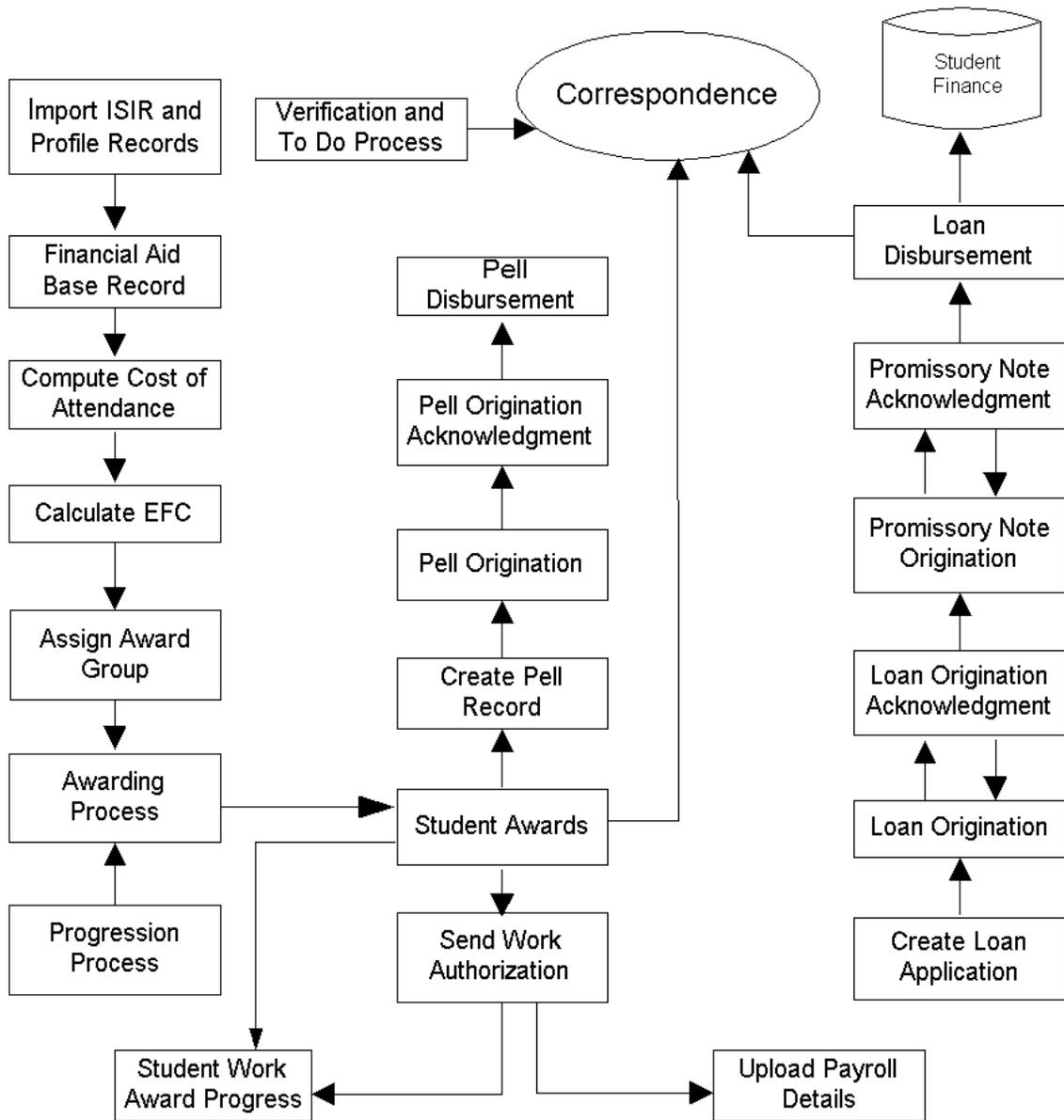

Figure 7–1 outlines the functional flow of financial aid management.

A financial aid award is made up of one or more funds, where each fund has a particular set of conditions governing the criteria that a student must meet, to receive funds.

Awarding processes can be run in simulated or actual mode. When run in simulation mode, the awarding process creates awards with Simulated status. These awards are helpful for the user to have an idea of how the awarding would be when awarding is run in actual mode.

Awarding is subject to holds placed on students by the academic progress function. There are two kinds of holds: holds on all funds and holds on specific funds. In the case of holds on specific fund(s), the awarding process awards those funds on which there are no holds, provided the student is otherwise eligible for those funds.

Disbursements

Once a student has an award package, the Financial Aid subsystem enables the user to interact with third parties to report and request certain types of the funds. For the federal Pell grant and federal direct loan programs, the system supports data that can be used to interact with the Common Origination and Disbursement (COD) system. For the Federal Family Education Loan Program (FFELP) and some private alternative loan programs, the system supports data in CommonLine 5 format that can be used to interact with various third parties.

The student employment function supports interaction with any Human Resource systems to monitor wages.

Financial aid management is complete when the funds are disbursed to students, disbursement records are created in the system, and the disbursement data is transferred to student accounts under student finance. Each student's account is updated with the disbursement information and appropriate credits are created against charges the student incurs.

Financial Aid Applications

Processing financial aid applications begins with importing or receiving Institutional Student Information Report (ISIR) records from the federal Central Processing System (CPS), College Scholarship Service (CSS) PROFILE records from the College Board, and institutional applications submitted by the students directly.

This section includes the following procedures:

- Importing and Viewing ISIR Records

- Importing and Viewing PROFILE Details

- Reviewing Unmatched ISIRs and PROFILE Records

- Maintaining Financial Aid Base Record

- Maintaining Institutional Application

For information on applications for financial aid submitted by students directly to the institution, see Chapter 4, Admissions, Entering Applications.

For ISIRs whose person details match existing person records in Oracle Student System, financial aid base records are created automatically. Depending upon the parameters selected in the ISIR import concurrent process, a person record and admission inquiry are also created for unmatched ISIRs.

A student's details such as SSN, given name, date of birth are assigned a weight between 0-5 as record matching criteria. A score is obtained by adding up the values and if the score is higher than the minimum defined for automatic creation of base record, a base record is automatically created.

If the score is lower than the minimum defined for manual review, the record is considered unmatched, and, based on a parameter, a person record is created. Based on the person record, a base record is also created.

Records that neither match existing person records, nor are totally unmatched (that is, partially-matched records) must be inspected and disposed of manually.

For information on record matching criteria, see Reviewing Unmatched ISIRs and PROFILE Records.

Importing and Viewing ISIR Records

Importing ISIR records proceeds in two stages: importing ISIR records into interface tables and importing data from the interface tables into Oracle Student System.

A concurrent process imports ISIRs into interface tables. Importing ISIRs from the interface tables into the system is performed by another concurrent process.

The import process matches ISIR records to person records in Oracle Student System and creates and updates financial aid base records for those persons. It identifies the partially-matched ISIR records as per the record-matching criteria: these records can be later reviewed manually. In addition, the concurrent process determines if ISIR is a payment ISIR and sets the value accordingly.

Application processing parameters specify whether an SSN is required for creating a base record and other such details.

Prerequisites

Application processing parameters must be set up.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- ISIR Loader Process

- ISIR Import Process

Financial Aid - ISIR Records - ISIR Summary - ISIR Summary page

Steps

1. To download ISIR records, run the ISIR Loader Process concurrent request by specifying the full path and name of the file to be imported.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To import ISIR records into Oracle Student System, run the ISIR Import Process concurrent request specifying the award year and the following parameters:

   Create Person Record if No Match: If Yes is selected, the system automatically creates person records and financial aid base records for unmatched records. If No is selected, unmatched ISIR records will remain unmatched.

   Create Admission Inquiry: If Yes is selected, an admission inquiry record is created for matched records where the person has no admission inquiry and for unmatched records if the Create Person Record on No Match is also set to Yes.

   Admission Inquiry Source Type: Specify the inquiry source type; this parameter is enabled only if Create Admission Inquiry is set to Yes.

3. In the ISIR Summary page, select an award year.

   Query a record on the person number, full name, social security number or transaction type. All ISIR records pertaining to the the query criterion specified are listed.

   Select an ISIR to view, modify, or compare from the ISIR search results.

4. Click **View** to display the View FAFSA Information window.

    From the View FAFSA Information window, you can click **Processed Data** to view the processed data section of the ISIR, which includes details such as family contribution, allowances, income, additional contributions.

    You can also view data related to loans by clicking **NSLDS**.

5. Click **Modify** to make changes to the ISIR. You can also review the modifications made in the Review ISIR Modifications page.

6. Click **Compare** to compare ISIRs. The Select ISIR to Compare window appears. For information, see Need Analysis.

See Also

Reviewing Unmatched ISIRs and PROFILE Records

Managing ISIR Corrections

Need Analysis

For general information on financial aid management, see Financial Aid Overview.

Importing and Viewing PROFILE Details

College Scholarship Service (CSS) PROFILE is used by institutions to provide students non-federal financial aid. PROFILE records are imported from the College Board and are stored in the system for institutional-aid processing.

The PROFILE import process performs the following tasks:

- matches PROFILE records to person records in Oracle Student System

    The PROFILE import concurrent process matches a student's social security number, first name, last name, date of birth, address, city, and zip code. If a match is found, the process adds the PROFILE record to the student's record and creates or updates a financial aid base record.

- imports PROFILE records to matching tables

You can manually inspect the records which score less than required to be auto-matched, and more than specified to be rejected as unmatched - as per record-matching criteria.

Prerequisites

None

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- PROFILE - Upload PROFILE Records

- CSS PROFILE Import

Financial Aid - PROFILE Records - PROFILE Details - PROFILE Details window

Financial Aid - Setup - Application Processing - Application Processing Parameters - Application Processing Parameters window

Steps

1. To load the CSS PROFILEs into interface tables, run the PROFILE - Upload PROFILE Records concurrent process by specifying the data file with path.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. Run the CSS PROFILE Import concurrent process by specifying the award year and the following parameters:

   Create Person Record if No Match: If Yes is selected, the system automatically creates person records and financial aid base records for unmatched records. If No is selected, unmatched PROFILE records will remain unmatched.

   Create Admission Inquiry: If Yes is selected, an admission inquiry record is created for matched records where person has no Admission Inquiry and for unmatched records if the Create Person Record on No Match is also set to Yes.

   Admission Inquiry Source Type: Specify the inquiry source type; this parameter is enabled only if Create Admission Inquiry is set to Yes.

3. In the PROFILE Details window, query a record.

4. To view the required information, click the appropriate button.

5. To view PROFILE information of the student, in the PROFILE Information region, click **Student**.

6. To compare a PROFILE, click **Compare**.

The Compare PROFILE Records window appears. The Student Information region displays the student's basic details. The PROFILE information region displays the details of the PROFILE categorized under different tabs. In each tab, the First region displays the PROFILE details and you can modify the details in the Second region.

7. Query a student record.

8. To change student details, enter data in the Second block.

   The Change Indicator check box is selected for the modified fields.

9. To specify application processing parameters, select the appropriate check boxes in the Application Processing Parameters window.

   Manual Review of Application, when selected, indicates that after the completion of to-do items, the application status is set to Manual Review of Application, and it must be changed to Completed manually. When Manual Review of Application parameter is not selected, application processing status is automatically set to Complete when to-do items are completed.

See Also

For general information on financial aid management, see Financial Aid Overview.

Reviewing Unmatched ISIRs and PROFILE Records

Unmatched records are ISIR or PROFILE records which match partially with existing person records in Oracle Student System. These records have a score less than the minimum score for automatic creation of base records and greater than the minimum score for manual review.

You can view each record marked for review, and compare it with all partially matched person records, and decide whether to map an ISIR or PROFILE to a person record or create a new person record.

You can also modify the record matching criteria from time to time.

Prerequisites

ISIR import process and PROFILE import process must be completed.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Setup - Application Processing - Record Matching Criteria

Financial Aid - Financial Aid Data Receipt - Review Unmatched Records

Steps

1. To specify record matching criteria, in the Record Matching Criteria window, specify the weight for various items. The value must be between 0 - 5.

    Specify the minimum scores for automatic creation of base records and manual review to create base record.

    If a record scores more than or equal to the minimum score for automatic creation of FA base record, the person record and ISIR or PROFILE are considered as matched during the import process.

    If a record scores less than the minimum score for manual review to create FA base record, then the record is considered unmatched, and a new person record is created during the import process, according to the parameter specified.

    If the score is in between the two, then the record is set aside for manual review.

2. To manually review partially-matched records, in the Review Unmatched Records window, query or select an award year from the list of values.

    The SSN, student name, and date received fields are populated.

3. In the Record Type field, select either PROFILE or ISIR from the drop-down list.

4. To view matching records, click **View Matches**.

    The Possible Record Matches window appears.

5. Click **Refresh Matches** to get the latest data.

6. To map a PROFILE or ISIR record to a person record in Oracle Student System and create a financial aid base record, select Force Record Creation and click **Add Record**.

7. To create a person record corresponding to the ISIR or PROFILE, click **Create Person**. This in turn creates a base record.

See Also

For general information on financial aid management, see Financial Aid Overview.

Maintaining Financial Aid Base Record

Financial aid base record includes all the information pertaining to the student. It is created when any of the following actions occur:

- notification is received that a student is interested in financial aid
- on receipt of an ISIR
- on receipt of a PROFILE record

Financial aid base record also provides information on the current status of aid processing for a student, the processing period, and the status of PROFILE details.

Note: Students may have only one base record per award year; if a student has two base records, they must be for different award years.

Financial aid base record history maintains the history information of student system data attributes that affect the processing of the financial aid of a student.

A single record for each Base ID is set as the primary record for maintaining the data attributes of a student in base record history. Oracle Financial Aid concurrent programs and rules uses this primary record to pick up the student system related information for the student from the history.

Prerequisites

None

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Financial Aid Base Record - Financial Aid Base Record window

Financial Aid - Financial Aid Base Record History - Financial Aid Base Record History window

Steps

1. In the Financial Aid Base Record window, query by student or by award year.

   The SSN, Full Name, and Effective Dates fields are displayed at the top.

   The Financial Aid Base Record window includes the following tabs:

- Summary tab displays the student's financial aid details and status. You can update the Professional Judgement check box.

- Admissions tab displays admission details.

- Need Analysis tab displays student ISIR and/or PROFILE information. You can click **View ISIR** or **View PROFILE** to go to View ISIR or View PROFILE window, and view details.

- Awards tab displays the student's award details and enables you to update the Cost of Attendance Code and Target Group fields.

- Enrollment tab displays the student's enrollment details.

2. Optionally, select the Professional Judgement check box. This indicates that professional judgment has been used in the case of this student.

   The Professional Judgement check box can be selected only if an Active ISIR value exists.

3. To view ISIR details, click **ISIR Details** in the Need Analysis tab.

   For more information on the ISIR details window, see Importing and Viewing ISIR Records.

4. Close the window to return to the Financial Aid Base Record window.

5. Click **Details**.

   The PROFILE Details window appears.

6. Click **Person Details** to view person details.

7. Click **Financial Aid Note** to view or edit Financial Aid Notes.

8. Select a person note type from the Person Note Type field.

9. Enter a description in the Short Description field.

10. Save your work.

See Also

For general information on financial aid management, see Financial Aid Overview.

Maintaining Institutional Application

Institutions receive applications from students requesting financial aid in electronic format. Institutions define questions for an award year as part of the institutional

application setup and a student's response to the questions are entered into the system by financial aid administrators.

You may add questions to the institutional application or disable existing questions if required. Disabled questions are not displayed in the Institutional Application window.

Prerequisites

Institutional Applications setup must be completed.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Setup - Application Processing - Institutional Application Setup - Institutional Application Setup window

Financial Aid - Institutional Application - Institutional Application window

Steps

1. In the Institutional Application Setup window, select an award year and enter the questions you wish to add.

   Select enable against the questions you entered. You can also clear the enable check box for questions that you wish to exclude from the institutional application.

2. In the Institutional Application window, enter a person number or query a record. The institutional application questions are displayed.

3. In the Answers field, enter the student's answer to the questions.

See Also

For general information on financial aid management, see Financial Aid Overview.

Verifying Financial Aid Applications

Institutions verify the accuracy of the data provided by the students after receiving a request for financial aid from the student. Verifying financial aid applications includes the following procedures:

- Assigning To Do and Verification To Do Items
- Tracking To Do and Verification To Do Items
- Managing ISIR Corrections

Data is reviewed during the verification process to determine if sufficient information exists for processing the application or if additional data is required from the student. Completeness of applications can differ according to the requirements defined by the institution. The requirements can vary between different categories of students at the same institution. The institution must conduct federal verification if an ISIR record is flagged for verification by the CPS.

Verification results in a request to the student for documentation to support the federal or institutional application for financial aid, and forwards a to-do list to the student.

To-do items are defined in the system typically during the implementation but to-do items can be added or removed from the predefined list.

Verifying financial aid applications includes tracking to-do items and verification to-do items, and making ISIR corrections. Students are required to produce documents after to-do items are assigned to them. This is done by way of sending out a missing items letter.

Based on the verification results and the original details provided in the ISIR, corrections are made and sent to the CPS. CPS then returns the modified ISIR as a correction ISIR.

A concurrent process compares the values of verification item as obtained from documents against the corresponding columns in the ISIR record. This comparison is based on the details entered in the Federal Verification Worksheet.

If all the values match, then the verification status in the financial aid base record is set to Accurate. If the values do not match, then a correction ISIR is generated, and the verification status is set to Correction Sent (Corrsent). The Corrsent status indicates that the financial aid base record is not yet verified, and ISIR correction is created for the student. It also creates a log file with details of the run.

Assigning To Do and Verification To Do Items

Each financial aid applicant is required to produce documents in support of his or her application: these are tracked as to-do items. To-do items may also include actions like having a discussion with the student.

After assigning to-do items to the students, a missing items letter can be generated (printed) asking the student to produce a document. The missing items letter can also be faxed or emailed to a specified destination.

Verification to-do items are those items which need to be compared. For instance, the student enters a certain value against tax paid; the to-do item requires the student to produce the tax form; finally, the value specified by the student is verified against the actual value given in the document.

You first attach selected to-do or verification to-do items to students or groups of students. Once assigned, the completion of these items is manually tracked.

Tracking to-do items also involves sending a missing items letter to the students.

Prerequisites

To-do items must be defined in the To Do Items setup window.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Setup - Application Processing - To Do Items - To Do Items window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Assign To Do Items Process

- Financial Aid - Missing Items Letter

- Assign Verification Items Process

Steps

1. To add or delete to-do items, in the To Do Items window, select an award year and enter an item code and description.

    Specify the maximum number of attempts to be made to obtain the to-do item from the student, and the attempt frequency in days.

    Enter the correspondence text to be used while sending a reminder to the student.

Select Career Item if the item is required to be verified only once in the student's stay at the institution. For instance, proof of a student's date of birth.

Select Required for Completion if the item is required for the application processing to be complete.

2. To assign to-do items to a student or group of students, run the To Do Items concurrent process by selecting the award year, specifying a student or selecting a person ID group, and selecting all of the to-do items you wish to attach to the student or group.

For information on running a concurrent process, see Concurrent Process Procedure.

3. Run the Missing Items Letter concurrent process by selecting the document required, specifying the selection criteria and then selecting a student or a a a list of students generated by a predefined CRM query, specifying a delivery type (email, fax, or print) and destination, and finally, the award year.

4. Run the Verification To Do Items concurrent process by selecting the award year, specifying a student or selecting a person ID group, and selecting the verification item and to-do items you wish to attach to the student or group.

Repeat the process to attach more items. You create and save request sets to repeat these actions.

Guidelines

The to-do items attached to the student can be viewed and tracked in the Track To Do Items window. The verification items can be tracked in the Federal Verification Worksheet window.

See Also

For general information on financial aid management, see Financial Aid Overview.

Tracking To Do and Verification To Do Items

You can view to-do items assigned to students by the to-do item assignment process and the verification to-do item assignment process.

You can view verification items and values as specified by the students and enter values obtained from the documents. You can also waive some items.

When the student returns the requested details, the data is entered in the student's verification worksheet. Many institutions choose to enter additional tax data from tax returns for use during verification by the institution.

Verification data elements are entered and compared with the active ISIR records. The ISIR ID in the financial aid base record is considered as the active ISIR. Comparison and verification are carried out against this ISIR record. If the values match or the verification item has been waived, then the student verification status is complete. If complete, records are updated as verified in then base record.

If records do not match and the item is not waived, then a concurrent process automatically raises a correction record for the mismatched field.

Prerequisites

Assign To Do Items and Verifications To Do Items Process concurrent processes must be run. Application processing parameters must be set up.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Track To Do Items

Financial Aid - Federal Verification Worksheet

Correspondence - Correspondence Interaction History

Steps

1. In the Track To Do Items window, in the Person Number field, query on a person number.

2. In the Item Code field, select a code from the list of values if you wish to add a to-do item. The current system date is displayed as the Add Date.

3. In the Status field, select a new status from the list of values. The current system date is displayed as the Status Date.

    The Max Attempts and Frequency are displayed as defined in the To Do Item setup window: you may modify them.

    The Required for Completion check box indicates that the to-do item is required for completing the application processing. You can override this if you wish to.

The Item Details check box is automatically selected when you make changes in the Item Details window.

4. Select Inactive to inactivate a new to-do item.

5. To view item details, click **Item Details**.

   The Item Details window appears.

6. Select the appropriate check boxes to override the (Incomplete) Reason Code and/or Requirement Code.

7. To return to Track To Do Items window, click **Done**.

8. In the Correspondence Custom Text tab, enter the text you wish to be used in a missing items letter.

   You can also click **Correspondence History** to view details of earlier correspondence related to the to-do item in the Correspondence Interaction History window.

9. In the Federal Verification Worksheet window, query a record.

   The Federal Verification Status, the Federal Verification Status Date, and Dependency Status are displayed.

10. In the Documentation column, enter the values of various verification items as obtained from the document.

11. Optionally, to indicate that the verification item is not required to complete the verification status process, select the Waive check box.

12. Save your work.

Guidelines

Three application processing statuses relate to tracking to-do items, Received, Requested (documents), and Complete.

If Manual Review of Application is selected in the Application Processing Parameters setup, then when the to-do items are received and the application is complete, the application process status is marked as Manual Review of Application.

At this point, you must open the record in Financial Aid Base Record window and manually change the status to Complete.

If the document is not available for comparison, the item is waived and verification process can be completed even without that value.

See Also

For general information on financial aid management, see Financial Aid Overview.

Managing ISIR Corrections

Correction records are created and sent to the CPS when there is a mismatch between the data provided by the student and the values obtained from the documents, which are entered in the verification worksheet.

The correction record also stores the batch ID, change status and other details to enable you to monitor change processing.

You can view and update the status of ISIR correction records. An output file of the corrected records is created and sent to the CPS.

A concurrent process sends the consolidated ISIR corrections file to the CPS. The CPS updates student information in the database and sends a corrected ISIR to the institution.

Once the correction output file is created, all the correction records display the status as Batched. After the corrections are acknowledged by the Federal Processor, the correction status is changed to Acknowledged.

ISIR corrections go through the following statuses:

- Ready indicates that the correction record can be included for processing.

- Batched indicates that the correction record has been sent to CPS for processing.

- Pending indicates that a correction was created while there are outstanding corrections at the CPS.

- Hold indicates that corrections are pending but the record is not included.

- Acknowledged indicates that a correction record has been received by CPS and a corresponding new ISIR record has been returned.

- Not Ready indicates that the correction record is not included.

The ISIR Batch Details window displays ISIR details. The ISIR data files have header and trailer records storing information such as the number of student records in the data file, number of new records, and number of old records. You can also validate the loaded data.

Prerequisites

Verification of applications must be complete.

All to-do items must be completed, except the ones overridden.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Verification - Create ISIR Corrections

- Verification - Create ISIR Corrections File

Financial Aid - ISIR Records - ISIR Corrections

Financial Aid - Financial Aid Data Receipt - ISIR Batch Details

Steps

1. Run the Verification - Create ISIR Corrections concurrent process by specifying the award year for which correction records are to be created.

   At this point, you may wish to view the correction records, modify, or add some corrections.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. In the ISIR Corrections window, query the appropriate record.

3. Modify Correction Item Status, if required.

4. Run the Verification - Create ISIR Corrections File concurrent process by specifying the award year for which the corrections file is to be created.

5. You may view the details of the uploaded ISIR records in the ISIR Batch Details window.

Guidelines

After making the corrections, you can compare the old ISIR and the correction ISIR in the Compare Applications window.

See Also

For general information on financial aid management, see Financial Aid Overview.

Need Analysis

Financial Aid is awarded to students based on their need. Need is calculated based on the cost of attendance (COA) at the institution and the student's expected family contribution (EFC).

Need = COA - EFC

While institutions define the cost of attendance for students, EFC is calculated according to federal government guidelines.

Assessing need includes assigning cost of attendance to students, calculating EFC, determining need, and comparing ISIRs.

Cost of attendance groups are created for the purpose of assigning cost of attendance to a group of students.

COA is the total amount needed to cover education expenses and includes tuition fees, accommodation and board, books, supplies, travel, and personal expenses. COA can be adjusted for individual need calculations and used while calculating the need.

Cost-of-attendance items are distributed across various terms consistently. If one of the items does not apply to a particular term, for that term, the item is assigned a value of zero.

Net need is also adjusted if additional financial resources are available to the student. The unmet need is calculated and updated when the awarding process generates an award package for the student or when a student is manually awarded a fund.

You can view and compare two ISIR records and create an ISIR correction record.

The school determines the corrections affecting the student's EFC that are to be automatically processed in the next correction batch. When the corresponding ISIR transaction is generated and returned to the school, application processing sets the appropriate status flags according to the student's status. If an ISIR is corrected, the record is automatically flagged for inclusion in a correction batch.

Determining need involves assigning cost of attendance to students, calculating EFC, and adjusting the values where required, and creating a correction ISIR.

Prerequisites

Verification of ISIRs must be completed.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Awards - Cost of Attendance Item Assignment

Financial Aid - Need Details - Need Details window

Financial Aid - ISIR Records - ISIR Summary - ISIR Summary page

Steps

1. Run the Awards - Cost of Attendance Item Assignment concurrent process by selecting the award year and, optionally, group code, person group or person number.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To compare multiple ISIRs pertaining to a student, go to ISIR Summary page.

3. In the ISIR Summary page, select an award year and then query on a person number, name, SSN, or transaction type.

4. Select an ISIR and click Compare. In the Select ISIR to Compare page, select an ISIR transaction ID and click **Continue**.

   The View ISIR Comparisons window appears, displaying the two ISIRs you have selected for comparison.

5. To modify one of the ISIRs, click **Modify**. The Modify ISIR page appears.

   For information, see Importing and Viewing ISIR Records.

Guidelines

The appropriate EFC, based on the duration of the COA, is taken from the active ISIR.

See Also

Managing ISIR Corrections

Administering Student Awards

Administering Student Awards includes the following procedures:

- Prepackaging Tasks

- Packaging Students and Funds

- Post-Packaging Tasks

Prepackaging tasks include adjusting student cost of attendance where required and assigning students to award groups. A student can be assigned to multiple award groups, one at a time. Packaging involves awarding funds to eligible students both manually and through concurrent processes, and generating the award-notification letter.

Post-packaging tasks are various miscellaneous tasks performed after awarding funds is completed. These include canceling offered awards, uploading external award details, and viewing aggregate award details.

When a student's cost of attendance is modified, the student's need for financial aid is re-calculated and is updated in the financial aid base record. The awarding process takes into account the modified need value.

Award groups are used in the awarding process for selecting students for an award. The award-group code can be specified as an optional parameter while running the awarding concurrent processes, and the process awards the specified fund to students belonging to that award group. When a student is specified for the awarding processes, the rules defined for the group to which the student belongs are applied.

A financial-aid package is made up of one or more funds, where each fund has a particular set of conditions governing the criteria that a student must meet, to receive funds.

Awarding processes can be run in simulated or actual mode. When run in simulation mode, the awarding process creates awards with Simulated status. These awards are helpful for the user to have an idea of how the awarding would be when awarding is run in actual mode.

Awarding is subject to holds placed on students by the academic progress function. There are two kinds of holds: holds on all funds and holds on specific funds. In the

case of holds on specific fund(s), the awarding process awards those funds on which there are no holds, provided the student is eligible for those funds.

When run in the simulation mode, awarding is subject to the same set of validations, as when run in actual mode. Simulated awards are for view only and are not picked up by the system to determine the resources of students.

Awarding can be done for a single fund or for all available funds. The package-single-fund process takes the specified fund and awards it to a student, all students in a person group, or all students in an award group, depending on which parameter was specified:

- a specified student, if a person number is specified

- students in a person group, if a person group is specified

- students in an award group, if an award group is specified

Note: You can specify only one of these three parameters. The award-students process can be run only once for a student in the actual mode.

The award-students process awards all funds for which a student is eligible. You must specify an award group code or a person number as a parameter. If you specify a student (person number), the process awards all available funds for which the student is eligible. Further, the process only awards funds specified in the fund sequence for the award group to which the student belongs.

If you specify an award group, the process awards available funds to all of the students in the group, depending on their eligibility.

Another concurrent process repackages students for awarding Pell grant based on actual enrollment status. In the initial packaging process, students are defaulted to full-time attendance: once the term begins, this process must be run to recalculate the Pell award based on actual attendance after the student is enrolled.

If the current Pell Origination record has been sent to the COD system, Oracle Student System does not repackage for that student, instead it posts a message in the log file.

Note: The awarding process awards a fund to a student only if the student has cost of attendance for a particular term for which the fund is available. For instance, if the fund is available for the fall term but the student does not have cost of attendance for that term, that fund is not added to the student's package.

The awarding process:

- identifies existing awards in the system

- identifies historical awards if required by the fund manager

- awards funds to eligible students

- updates the fund manager with account totals when run in the actual mode

Student-award details resulting from awarding can be viewed and modified.

Post-packaging tasks include canceling offered awards, viewing aggregate award details (by award year or by fund code), and uploading external award files.

Prepackaging Tasks

Student cost of attendance is automatically assigned by a concurrent process. However, the COA can be modified, or, in the case of students who have not been assigned a COA, it can be assigned manually. The changes made here are taken into account while awarding funds to students.

As such cost of attendance is defined during implementation and the items are assigned to students. You can also create new cost of attendance items before defining a student's cost of attendance.

During the awarding process, you can specify a student by person name, or an award group as the parameter. Award groups are defined as part of the awards setup. Students are attached to award groups by a concurrent process.

You can also upload external award details into the system. External awards are those made by other means than financial aid subsystem. The format in which these awards are uploaded are predefined. Moreover, the terms in the flat file must match with the terms in the external-term mappings.

Prerequisites

Financial Aid applications must be processed and verified.

Student Cost of Attendance and EFC must be determined, and need must be assessed.

Award Groups must be defined.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Setup - Cost of Attendance - Cost of Attendance Items - Cost of Attendance Items window

Financial Aid - Student Cost of Attendance by Item - Student Cost of Attendance by Item window

Financial Aid - Student Cost of Attendance by Term - Student Cost of Attendance by Term window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Awards - Assign Award Groups

Requests - Concurrent Manager - Requests - Run (Request Set) - Submit Request Set window - Awards - Retrieve and Load External Award File

Steps

1. To create cost of attendance items, in the Cost of Attendance Items window, enter an item code and description.

   In the Student Cost of Attendance window, you may select this item and specify other details such as amount, Pell amount, and so on.

2. In the Student Cost of Attendance by Item window, query a person to display the person's cost of attendance details.

   If the person does not have a cost of attendance assigned already, you can specify the details in this window.

   You can modify any of the cost of attendance details for those persons to whom cost of attendance is already assigned.

3. Enter or modify the Item, Amount, Pell Amount, and Pell Alternate Expense, and, optionally, select the Fixed box to indicate that the cost is fixed.

4. Enter or modify the term-wise break-up for the item in the Terms region.

5. Click **Modify Terms** to add or remove terms for a particular item.

6. In the Modify Terms window, select either Add or Remove and select a term to be added or deleted, and then click **OK**.

7. View cost of attendance items and the amounts by term in the Cost of Attendance by Term window.

8. To assign students to award groups, run the Awards - Assign Award Groups concurrent process by specifying the award year and award group, and either person ID group or person number.

   For information on running a concurrent process, see Concurrent Process Procedure.

9. To upload external awards, run the Awards - Retrieve and Load External Award File concurrent process by specifying the data file with path.

See Also

For general information on financial aid management, see Financial Aid Overview.

Setting up Fund Manager and Award Groups

Fund manager defines a funds attributes such as total available amount, payment terms, and disbursement details. Each fund is defined during the implementation but the attributes can be modified as required. Fund manager attributes determine the outcome of awarding processes.

A financial aid package is made up of one or more funds where each fund has conditions or constraints governing its allocation. Constraints can include specifying the fee classes, units, or programs for which the fund can be paid. You can also specify whether the fund is posted under planned credit in student accounts.

Fund Manager attributes can be rolled over from a previous award year, or they can be newly defined.

Award groups define the upper level constraints of a student's financial-aid package. For example, a school has a policy stating that incoming freshmen cannot receive more than 60% in grant assistance or the maximum grant assistance from all grant funds cannot exceed $5,000.

Award groups set overall awarding constraints on each group of students. Schools can set these high-level constraints based on several variables and to set them either as a percentage or a fixed dollar amount. In addition, schools can use a gap awarding formula for a group of students. This is essentially an unmet need amount applied before any aid is awarded. Award group also specifies the total amount of aid that a student in the group can receive.

Prerequisites

System Award Year Mappings must be completed.

Fund Calendar Relations must be completed.

Fund Type must be completed.

Fund Codes must be completed.

Award Expiration Date must be completed.

Fee Types must be completed.

Credit Types must be completed.

Financial Aid Attendance Type Mapping must be completed.

No NSLDS History Disbursement Date Offset must be completed.

Verification Enforcement Date Offset must be completed.

Disbursement Expiration Offset must be completed.

Basic Program Details must be completed.

Basic Unit Details must be completed

To Do Items must be completed.

Loan Calendars must be completed.

Date Alias Offset for Disbursements must be completed.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Awards - Rollover Fund Attributes

Financial Aid - Setup - Award Processing - Funds - Fund Manager - Fund Manager window

Financial Aid - Setup - Award Processing - Award Packaging - Award Groups - Award Groups window

Steps

1. To roll over fund attributes from one award year to another, run the Awards - Rollover Fund Attributes concurrent process by specifying the award year and fund code.

    The fund attributes are rolled over from the specified award year to the following award year, as specified in Fund Calendar Relations.

    For information on running a concurrent process, see Concurrent Process Procedure.

2. To define or modify fund attributes, in the Fund Manager window, select the fund code and award year.

    In the summary tab, enter the authorized amount and, optionally, exceed by amount or percentage. The awarding process takes into account the exceed by figures while awarding the fund to students.

3. In the packaging tab, specify the maximum amount and the initial award status. You can click **Award Status** to enter the text to be included in the award notification letter.

    Lifetime max award specifies the maximum amount a student can receive out of this fund during the entire period of study at the institution.

    Award expiration offset is the date alias which specifies the duration from the date of offering the award until it is canceled.

    Lifetime max terms is the number of terms the fund can be paid to a student during the entire period of studies at the institution.

4. In the disbursements tab, specify the disbursement eligibility criteria and other details.

    Specify the fee type against which charge is to be created in student finance when a disbursement of this fund is canceled.

    Specify the credit type against which the fund disbursement is posted in student accounts.

    Include as planned credit indicates that the disbursement goes toward the planned credits of the student in student accounts. Include as planned credit applies to all disbursements (loans, Pell, and general disbursements). However, it can be overwritten in the disbursement windows: if you overwrite the include as planned credit setting for one of the disbursements, it is applied to all disbursements.

> **Note:** Include as planned credit can be selected only when Disburse to Student Account is selected.

You can also specify pays only fee classes, units, and programs, and fund-specific to-do items from the disbursements tab.

5. Click **Pays Only Fee Classes** to specify the fee classes that this fund pays for. Specify the fee classes by selecting from a list of values: these fee classes, such as Books, Tuition, and so on, are defined in student finance.

6. Click **Pays Only Programs** to specify the programs that this fund pays for. Specify the programs by selecting from a list of values: these programs are defined in program structure and planning.

7. Click **Pays Only Units** to specify the fee classes that this fund pays. Specify the units by selecting from a list of values: these units are defined in program structure and planning.

8. Click **To Do Items** to specify to-do items specific to this fund. In the To Do Items window, specify the to-do items by selecting from a list of values.

9. In the student employment tab, specify the government's share of the work-study award, maximum and minimum hourly rates, and the notification threshold. You may specify a percentage or a value for the notification threshold.

   When the fund is disbursed to the extent of the threshold percentage or value, a notification is generated and sent to the employer.

10. In the relative funds tab, specify the exclusive and relative funds: exclusive funds are those that cannot be awarded with the fund being defined; relative funds are those that are always awarded with the fund being defined.

11. In the terms tab, specify the percentage of the fund to be awarded in each term.

12. Click **Fund Term Installments** in the terms tab to go to the Fund Term Installments window, and specify the distribution within a term, across teaching periods for the fund.

13. To define or modify award group, in the Award Groups window, select an award group and specify the award group details.

14. Save your work.

See Also

For general information on financial aid management, see Financial Aid Overview.

Packaging Students and Funds

Awarding is the process of awarding funds to students. Awarding is carried out by running the concurrent processes listed below:

- Award Students

- Package Single Fund

- Repackage for Pell Grant

Funds can also be awarded manually. After awarding is completed, award notifications can be generated by running a concurrent process

In an award year, awarding is automated at the beginning of the cycle when large groups of students require awarding. Automated awarding becomes too cumbersome for smaller groups of students, and is generally stopped at the beginning of the academic year.

Subsequent awarding is then carried out on an individual basis. Financial Aid enables automated awarding for the entire award cycle for an award group or an individual student. Student awards details resulting from awarding process can be viewed and modified manually.

Students are awarded on the basis of the constraints applicable to the award group to which they belong.

Prerequisites

- Cost of attendance must be specified for the students for whom awarding is being carried out

- The funds being awarded must be defined in Fund Manager, and award groups must be specified.

- Funds must have the load calendars and term installments set up.

- Students must be assigned to award groups. An exception to this is when the fund can be autopackaged, and the Package Single Fund is being run.

- Students must have a Payment ISIR.

- Students must not be subject to awarding holds.

- The Verification Process Status of the student must map to one of these terminal statuses: Accurate, Notselected, Reprocessed, Notverified, and Waived.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Awards - Repackage Pell Grant

- Awards - Package Single Fund

- Awards - Award Students

- Financial Aid - Award Notification Letter

Financial Aid - Awards - Student Awards - Student Awards window

Steps

1. To award all available funds, run the Awards - Award Students concurrent process by specifying the award year, and Get latest OSS information.

   Specify the run type: simulation or actual.

   Specify whether the system must get latest OSS information.

   Specify run mode: detailed or Summary.

   Specify Notify Awards to Students: yes or no. If you specify Yes, the system generates an award notification letter by triggering the Financial Aid - Award Notification Letter concurrent process.

   Optionally, you may specify an award group or person number: one of the two is required.

   This process checks for existing person holds and excludes specific funds or all funds for the particular student, and proceeds with the next student.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To award a single fund, run the Awards - Package Single Fund concurrent process by specifying the award year and fund code.

   You may specify any one of award group, person number, or person group.

This process checks for any person holds and if the fund is excluded from being awarded, does not award the fund to the student, and proceeds with the next student.

For information on person holds, see Chapter 8, Academic Records, Applying Progression Rules and Outcomes.

Note: For students who do not belong to any award group, awarding can be done with the Package Single Fund concurrent process, if the fund has the auto packaging parameter set to Yes in the Fund Manager window, Packaging tab.

3. To repackage for Pell grants, run the Awards - Repackage Pell Grant concurrent process by specifying the award year and optionally, person number.

   If no person number is specified, then all of the students are repackaged for Pell.

4. To view or modify student awards, query person in the Student Awards window.

   You can modify an existing award or add a new award record. No award except a simulated award can be deleted.

   The offered amount and accepted amount can be changed only through the Disbursement Details window.

   When you change the offered or accepted amounts in the Disbursement Details window and return to the Student Awards window, the new offered and accepted amounts are displayed.

   Note: For a direct loan award, you cannot enter decimals. If you enter decimals, the system changes them to .00.

   You can create an award, that is, add an award, either in Offered or Accepted status only.

   The award status field can be updated from Offered to Accepted, Accepted to Canceled, Declined to Canceled, Offered to Canceled, or Declined to Offered. Other ways of updating the award status are not permitted.

   Note: Simulated award status cannot be updated. Award status is displayed as simulated when a fund is awarded in simulated mode.

   If a disbursement hold is placed by the academic progress function for the fund or student, the system prompts a message stating that a disbursement hold will be placed on the award. However, you can proceed with the award.

If a hold exists for a specific fund, the system does not allow you to award the fund and displays a message stating that an academic progress hold exists. If a hold on all funds exists, then the hold can be overridden and the fund can be awarded.

For information on person holds, see Chapter 8, Academic Records, Applying Progression Rules and Outcomes.

5. Click Disbursement Details to view or modify disbursement details. See Disbursements.

   Note: The Disbursement Details button is enabled for all the awards where the fund is not of type Work Study and Sponsorship. For Work Study funds the Disbursement Details button is disabled and Work Study Details button is enabled. The Work Study Details button is disabled for all other funds.

6. Click Work Study to view or modify work study details. See Student Employment.

7. To generate award letters, run the Financial Aid - Award Notification Letter concurrent process by specifying the Document Name, Selection Criteria, Automatic Term Selection, Delivery Type, and award year.

   Selection Criteria determines whether you specify a List or a person number.

   Automatic Term Selection selects the terms for which you wish to notify award; alternatively, you may select the load calendars.

   Delivery type can be email, fax, or print: you must specify the appropriate destination.

Guidelines

The following validations are applicable to the Awards - Package Single Fund concurrent process:

- A fund that is already awarded to the student is never re-packaged for that student. Such funds are skipped in the packaging run for that student.

- Funds are subjected to exclusive and contingent funds check as set up in the fund manager. The existing awards of the student are also taken into consideration to determine whether a fund passes the exclusive and contingent check.

- The EFC information from the Active ISIR is used for award packaging.

- For awarding Pell, the 9 month EFC of the student known as Paid EFC on the payment ISIR is used as the EFC for determining the Pell award from Pell

matrix. The cost of attendance is also different for Pell. It is the Pell cost of attendance as set up in the cost of attendance.

- When awarding Pell through the packaging process, the attendance type defaults to Pell Full Time attendance.

- If the fund is a loan and federal fund code is DLS, DLU, FLS, or FLU, then the student is subjected to Stafford loan limits. If the Stafford loan limits are not set up for the Direct Loan and FFELP Loan grade levels, then the system does not award any of these funds to the student. If the award is for the current term, the system uses actual class standing of the student to determine the Stafford loan limits. If the award is for the future term, then the system uses predictive class standing.

- The award amount of the fund is subject to the minimum and maximum award amounts defined in the fund manager and award group. The fund is also subject to validations on maximum yearly amount, maximum life time amount and the maximum number of times the fund can be awarded - as defined in fund manager setup.

- Before awarding a fund, the need as per the EFC methodology (attached to the fund) is determined. If no need exists, then system checks whether the fund is an entitlement. If it is an entitlement, it awards the fund, without looking into the need. If it is not an entitlement, then it checks whether the fund can replace the family contribution (as defined in fund manager). If the fund can replace the family contribution, the fund is awarded to the extent of the remaining family contribution that can be replaced. Family contribution would be replaced by the existing awards in the system or the other funds in the current run that are prior in the sequence.

- The awarded amount is subjected to the award policy level validations i.e., Maximum Grant, Maximum Loan etc., depending on the fund type. The award amount from the fund is sometimes adjusted downwards to meet these award policy level validations. But the downward adjustment always happens for funds that are not entitlement. In the case of entitlement funds, these policy level checks do not apply.

- If any award results in overaward to the student, then an overaward hold is placed on all the disbursements of that award. The need to calculate the overaward is always calculated as per the federal methodology.

- Disbursements for the award are created as per the setup for the fund done in the fund term installments in the fund manager.

- When attaching the ToDo items to the student while awarding a fund (Todo items for a fund are defined in the fund manager setup), only the ToDo items that are not attached to the student already are attached.

- While awarding students, the unmet need is considered and the student with maximum unmet need is awarded first.

- If a student is over-awarded by a awarding process, it automatically creates an disbursement hold. The holds must be released manually in the Disbursement Holds window.

  Overaward results when an entitlement fund is awarded after other funds. For instance, when a student is awarded funds to meet all or most of the need amount, and then an entitlement fund is awarded (an entitlement fund is awarded irrespective of the need).

See Also

For information on financial aid management, see Financial Aid Overview.

For information on Pell grants, see Administering Pell Grants.

For information on loan processing, see Administering Loans.

For information on disbursement of funds to students, see Disbursements.

Post-Packaging Tasks

Once students are awarded funds and letters notifying the award are sent out, you can cancel awards if the students do not accept them before the deadline for accepting them. Awards can be canceled for all of the funds in an award year or a specific fund.

You can view aggregate award details by award year/fund code or by fund code/award year. This enables you to see how much of a fund is used up at any time.

Prerequisites

Awarding processes must be run.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Awards - Cancel Offered Awards

Financial Aid - Awards - View Aggregate Awards by Award Year/Fund Code - View Aggregate Awards By Award Year/Fund Code window

Financial Aid - Awards - View Aggregate Awards by Fund Code/Award Year View - Aggregate Awards By Fund Code/Award Year window

Steps

1. To cancel an offered award, run the Awards - Cancel Offered Awards concurrent process by specifying the award year.

   Optionally, you may specify a Fund Code and person number.

   If no fund code is specified, awards made from all of the funds are considered for cancellation. If no person number is specified, the process cancels all those awards which have not been accepted by the offer acceptance due date.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To view the aggregate award details by award year, query on a person number in the Aggregate Awards By Award Year/Fund Code.

   Scroll down the Award Year field to view details of previous award years.

3. To view the aggregate award details by award year, query on a person number in the Aggregate Awards By Award Year/Fund Code.

   Scroll down the Fund field to view details of the other funds.

See Also

For information on person holds, see Chapter 8, Academic Records, Applying Progression Rules and Outcomes.

Administering Student Sponsorships

Sponsors can pay for all or a portion of a student's tuition and and other fees, for specific terms. The sponsorships functionality, also known as third-party billing, captures details of the sponsorships and relates them to the student.

The sponsorship function enables you to define sponsor details, assign students to a sponsor, and maintains details of which fee classes the sponsor pays for, and what

percentage of the fees (to a maximum amount) or an amount the sponsor is willing to pay for the assigned student.

Administering sponsorships includes collecting person information from Oracle Student System and creating the financial aid base record. This process is a prerequisite for awarding sponsorships to students.

Students are assigned to sponsors manually and then funds from the specified sponsor are awarded to the students automatically through a concurrent process.

A concurrent process creates awards based on sponsorships. It also checks for eligibility criteria and validations before awarding the sponsor amount to the students.

Awarding funds to the students can also be done manually for non-sponsorships but sponsorships are awarded only through the sponsor award process. However, you may create disbursements manually. See Administering Student Awards.

Sponsorships are disbursed and the amounts are transferred to student accounts in student finance with a concurrent process. See Disbursements.

You can also carry forward the details of sponsor setup or sponsor-student relationships, or both, from a specified award year to the following award year as mapped in the Term/Load Calendar mappings. You can specify which details are to be rolled over.

Prerequisites

- Active Award Year, Term/Load Calendar rollover mappings must be present in the Financial Aid calendar tables.

- Awards - Rollover Fund Attributes process must be performed.

- Fund Type, Fund Code, System Year Mappings, and Fund Calendar Relations setups must be complete.

- Sponsor setup must be complete.

- Financial aid base records must be created.

- In the case of planned credits, system options must be defined appropriately.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Student Finance - Sponsorships - Assign Students to Sponsor - Assign Students to Sponsor window

Sponsorships - Assign Students to Sponsor - click Program Details - Program Details window

Student Finance - Sponsorships - Student Sponsorships - Student Sponsorships window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

   - Awards - Rollover Sponsorship Attributes

   - Awards - Assign Sponsorship Awards

   - Base Record - Create Financial Aid Base Record

Steps

1. To create a student's base record, run the Base Record - Create Financial Aid Base Record concurrent process by specifying the award year, and either a person number or a person ID group.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To view or modify details of students assigned to sponsors, in the Assign Students to Sponsor window, query on a student. The Term Details region displays details specified in the Sponsor Setup window. You may not modify these details.

   The person details and pays only details are displayed for the selected term. You can modify the details you wish to.

   Modify the minimum attendance type and minimum credit points required by the student.

   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.

3. Click Program Details in the Assign Students to Sponsor window to specify the percentage or maximum amount at the program and unit levels.

   Note: This window cannot be opened if the fee class is other than tuition, or if the percentage or amount for the tuition fee are specified.

Click **Back** in the Program Details window to return to the Assign Students to Sponsor window.

4. To assign sponsorship awards, 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.

Term calendar and sponsor code are enabled when the award year is selected.

Optionally, specify a person number or person ID group. One of the two must be specified.

You may run this process in test mode by specifying Y for Test Mode. Specifying N runs this process in actual mode.

The process assigns awards for the specified student or group of students.

5. To view or modify student sponsorship details, in the Student Sponsorships window, query on a person. The Term Details region displays details as specified in Sponsor Setup are displayed.

The Sponsor Details and Pays Only details are displayed for the selected term.

Modify the details as you require, and save your work. Note that you can only specify either total sponsor amount, or pays only fee class (percentage or amount).

Note: You cannot modify student details if an award has already been made.

6. To roll over sponsor setup details from a specified award year to the following award year, run the Awards - Rollover Sponsorship Attributes concurrent process by specifying the award year from which sponsor details are to be rolled over.

For the Rollover parameter, specify R to roll over sponsor-student relations; S to roll over sponsor setup; or B to roll over both. You must specify the sponsor code for S and B options.

You can run this concurrent process in the test mode or actual mode by selecting the appropriate option for Test Mode (Y: run in test mode; N: run in actual mode).

Guidelines

The sponsor disbursements are posted into the student's account by the concurrent process Awards - Disbursements - Transfer to Student Account.

See Also

For information on transferring disbursement details to student account, see Disbursements.

For information on planned and actual credits, see Setting up Fund Manager and Award Groups.

Administering Pell Grants

Administering Pell grants includes:

- Maintaining Pell Origination Records

- Maintaining Pell Disbursement Details

- Maintaining Pell Grant Data

The Common Origination and Disbursement System (COD) interacts with the Financial Aid subsystem for approving Pell grant payments. COD requires that schools originate federal Pell grants before disbursement. Schools use the Electronic Data Exchange (EDE) automated process to transfer Pell grant data to and from COD.

Pell grant processing starts with creating Pell records for an individual student or all of the students pertaining to an award year. The create Pell grant record process selects all of the Pell awards from among the awards made manually or through the awarding process, and creates a Pell record for the student for each Pell award. This process also creates Pell disbursement records for each Pell award.

You can then view and modify the Pell records before sending them to COD. The create Pell grant origination process creates a flat file, which is sent to COD.

COD returns an acknowledgment for every origination record sent by the institution. The acknowledgement confirms receipt of the record and indicates the record status as follows:

- A indicates accepted

- C indicates corrected

- E indicates rejected

The acknowledgment also includes the values of the grant approved by COD and any data corrections.

You can update Pell origination data in COD by resubmitting the record with the relevant changes. For example, an origination record can be updated if there are

changes to the student's data that affect the award amount or if COD sets values that you wish to change.

Note: You must review and update the origination record, if appropriate, when the acknowledgement record is received. COD uses the origination award amounts to verify disbursement requests.

COD returns the Pell origination records after validation in a flat file. The flat file is then uploaded through the Pell origination acknowledgment process.

The Pell origination acknowledgment process loads acknowledged data from the external flat file into a staging table, and imports the data from the staging table into the system.

The create Pell disbursement records process reads data from Pell disbursement records and writes it into a flat file that is sent to COD.

Pell disbursement records are validated and returned in a flat file by COD. The flat file is then uploaded by a concurrent process. The process first loads the data into staging tables, and from there imports them into the system.

COD stores year-to-date data (YTD) records which contain details of origination and disbursement for each student, as well as a summary of all information submitted by the school. YTD records are copies of all student data in COD. YTD records can be used to rebuild a database. You can request YTD data from COD and upload it into the system from time to time, as part of housekeeping exercises.

YTD data includes only information from accepted or amended records. This data is not processed. COD does not retain any information from rejected records. YTD records are not automatically sent to institutions; you must request the records if you require them.

In order to reduce potential overpayments, COD uses multiple reporting records (MRR). MRRs are used to notify schools when an origination or disbursement record is submitted for an existing student by another institution. Institutions are permitted to request records, but MRRs can be sent automatically in some situations. The MRR data is not processed. Uploading MRRs as part of housekeeping.

COD sends an electronic statement of account (ESOA) record to institutions to notify them of their initial authorization. As the school reports disbursements to COD, COD makes any necessary adjustments to the authorization and ensures that funds are available to the institution. COD enables the U.S. Department of Education to track a school's need for funds as the award year progresses and adjusts the institution's authorization on that basis.

The ESOA is a fixed-length record. ESOAs are transmitted on the same day they are processed by the U.S. Department of Education. ESOAs can be retrieved by the institution at any time for a six-month period following placement on the network. ESOAs are deleted if not retrieved within this six-month period. The ESOA data is not processed.

Maintaining Pell Origination Records

Pell records are sent to COD as a flat file. When COD returns the records, as a flat file, they are uploaded into Financial Aid subsystem.

You can make changes to the records, if required, and re-send the origination records. The records approved and acknowledged by COD form the basis for disbursements.

The Pell records process also creates Pell disbursement records, which are discussed in greater detail under Maintaining Pell Disbursement Details.

Prerequisites

Pell setup must be completed.

Awarding process or manual awarding must be completed.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Pell Grant Processing - Pell Origination - Pell Origination window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Pell Grant - Create Pell Grant Records from Awards

- Pell Grant - Create Pell Grant Origination File

Requests - Concurrent Manager - Requests - Run (Request Set) - Submit Request Set window

- Pell Grant - Upload Pell Origination Acknowledgments

Steps

1. To create Pell grant records, run the Pell Grant - Create Pell Grant Records from Awards by specifying the award year and, optionally, a person number.

   You must also specify whether you wish to get latest OSS data.

   If you specify a person number, a Pell record is created for that student; if not, Pell records are created for all students for the award year.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. In Pell Origination window, select an award year from the list of values.

   The effective dates are displayed based on the award year selected.

3. In the Person Number field, select a person number from the list of values.

   Depending on the person number selected, the Pell grant details from the record created by the create Pell grant process are displayed.

   Note: Only records of the status Ready to Send and Not Ready can be modified.

4. Modify the origination status, if you wish to. Note that only ready-to-send records are sent to COD.

5. Optionally, in the Pell I tab, modify the Cost of Attendance, Enrollment Status, Enrollment Date, and Transaction ID.

   Optionally, in the Pell II tab, modify any of the values except Low Tuition and Fees Code and Secondary Family Contribution.

6. Click Pell Disbursements to view disbursement details. For information, see Maintaining Pell Disbursement Details.

7. Save the record and proceed with the next.

8. To send Pell origination records to COD run the Pell Grant - Create Pell Origination File concurrent process by specifying the award year and, optionally, a person number.

   If you do not specify a person number, all Pell records for the award year are written into the file.

9. To load Pell origination acknowledgments received from COD, run the Pell Grant - Upload Pell Origination Acknowledgements by specifying the data file with path.

Guidelines

Pell grants are awarded only to undergraduate students. This is ensured by validations built into the awarding process and manual awarding function.

See Also

For general information on financial aid related procedures, see Financial Aid Overview.

Maintaining Pell Disbursement Details

Maintaining Pell disbursement details begins with the creation of disbursement records. You can then create a Pell grant disbursements file and send it to COD for approval. When COD returns the records, you upload them to the system, thus completing the disbursement maintenance procedure.

Pell disbursements can be viewed and modified before sending the records to COD. However, after making any modifications, you must create a Pell grant disbursements file once again and send the updated file to COD. If COD returns the records with modifications, you must create a disbursements file and send it back to COD. Only the data that exists in COD is legitimate/valid.

Prerequisites

Pell grant records must be created and sent to COD.

Origination acknowledgments uploaded into the system.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Student Awards - Student Awards - Student Awards window

Financial Aid - Pell Grant Processing - Pell Origination - Pell Origination window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Pell Grant - Create Pell Grant Disbursements File

Requests - Concurrent Manager - Requests - Run (Request Set) - Submit Request Set window - Pell Grant - Upload Disbursement Acknowledgments

Steps

1. To create a Pell disbursements file, run the Pell Grant - Create Pell Grant Disbursement File concurrent process by specifying the award year and, optionally, a person number.

   If you do not specify a person number, the process adds all Pell disbursement records for the award year specified.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To view Pell disbursement details, in the Pell Origination window, click **Pell Disbursements**.

   Alternatively, to modify disbursement details, select a Pell award record in the Student Awards window and click **Disbursement Details**.

   Pell Disbursements window appears and displays details of the student selected in each window.

   If Pell Alternate Schedule has been used for awarding Pell during awarding, it is indicated by a check box.

   Include as planned credit indicates that the disbursement goes toward the planned credits of the student in student accounts. This is defined in the fund manager, but it can be overwritten.

   Note: Include as planned credit can be selected only when Disburse to Student Account is selected.

3. In the Pell Disbursements, make the required modifications.

   Note: You cannot make modifications to records which are already sent to COD. You can only modify records of status Ready or Not Ready.

4. Save the record.

5. Click **Holds** if you wish to place or release disbursement holds. For information, see Disbursements.

6. To view adjustment details, click Adjustments. For information, see Disbursements.

7. To upload disbursement acknowledgments received from COD, run the Pell Grant - Upload Disbursement Acknowledgements concurrent process by specifying the data file with path.

See Also

For general information on financial aid related procedures, see Financial Aid Overview

Maintaining Pell Grant Data

Pell grant maintenance tasks include uploading the year-to-date ((YTD) data, multiple reporting records (MRRs), and statement of account detail and summary.

Statement of account data is only available with COD for six months from the time it is sent to the U.S. Department of Education.

Prerequisites

The relevant data files must be obtained from COD.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Request Set) - Submit Request Set window

    - Pell Grant - Upload Year-to-Date Data

    - Pell Grant - Upload Multiple Reporting Records Data

    - Pell Grant - Upload Statement of Account Detail

    - Pell Grant - Upload Statement of Account Summary

Steps

1. To upload year-to-date data, run the Pell Grant - Upload Year-to-Date Data concurrent process by specifying the data file with path.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To upload year-to-date data, run the Pell Grant - Upload Multiple Reporting Records Data concurrent process by specifying the data file with path.

3. To upload year-to-date data, run the Pell Grant - Upload Statement of Accounts Summary concurrent process by specifying the data file with path.

4. To upload year-to-date data, run the Pell Grant - Upload Statement of Accounts Detail concurrent process by specifying the data file with path.

Guidelines

All the processes described above have two phases: first, the data in the file specified is loaded into interface tables, and then it is imported into the system.

See Also

For general information on financial aid related procedures, see Financial Aid Overview

Administering Loans

Oracle Financial Aid supports the processing and administration of federal direct loans and FFELP loans. Administering loans includes the following procedures:

- Loan Setup

- Loan Origination

- Modifying Direct Loan Origination Details

- Promissory Notes

- Loan Disbursements

Administering loans involves originating loan records, modifying the origination records, processing the promissory notes for direct loans, and loan disbursements.

The loan origination record is a document that indicates the intent to take a loan, certifies eligibility, and specifies the amount and dates the loan is expected to be disbursed to the student.

Note: Loan start date and end date are not the dates of the first and last disbursements. Effective loan dates are the start date of the term in which the first disbursement is made and the end date of the term in which the last disbursement is made.

Direct loan origination details can be modified at a later point, whereas FFELP origination details cannot be modified. Direct loans also involve promissory notes and promissory note manifests, whereas for FFELP loans, these documents are not processed in Financial Aid.

Loan disbursement details are included in the origination record in the case of FFELP loans, and as a separate record in the case of direct loans. The disbursements are acknowledged by the lending agencies, and they are uploaded into the system.

Disbursement holds are sometimes placed on specific disbursements as per progression rules and other considerations. Disbursement holds can be manually released.

For direct loans, the LOC also sends a reconciliation year-to-date report (summary and detail) and these are uploaded into the system as part of loan administration.

Loan Setup

FFELP loans involve external lenders, guarantors, and servicers. Details of all lenders, guarantors, and servicers who interact with the institutions' financial aid office are captured during the implementation. However, you can modify the details in the course of administering loans.

Prerequisites

None

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Setup - Loan Processing - FFELP - Guarantor Codes - Guarantor codes window

Financial Aid - Setup - Loan Processing - FFELP - Lender Codes - Lender codes window

Financial Aid - Setup - Loan Processing - FFELP - Servicer Codes - Servicer codes window

Steps

1. To define a guarantor, in the Guarantor Codes window, enter a unique guarantor code, description, and optionally, the DUNS ID.

   Optionally, select the Enabled check box to indicate that the guarantor is active.

2. To define a lender, in the Lender Codes window, enter a unique lender code, description, and optionally, the DUNS ID.

    Optionally, select the Active check box.

    If you wish to enter the Lender Non-ED Branch details, enter a unique Branch ID and description, and optionally, select the Active check box to indicate that the branch is active.

3. To define a servicer, in the Servicer Codes window, enter a unique servicer code, description, and optionally, the DUNS ID.

    Optionally, select the Active check box.

    If you wish to enter the Servicer Non-ED Branch details, enter a unique Branch ID and description, and optionally, select the Active check box to indicate that the branch is active.

See Also

For general information on financial aid management, see Financial Aid Overview

Loan Origination

You can create loan application records for all types of loans, including direct loans and FFELP loans, based on award details generated by award processing. The application record includes loan details such as the award year, fund code, and award ID.

You must first create loan applications from awards and then run the origination processes, which create the origination records. Loan origination records are then sent in a file to the loan origination center (LOC) or an external lending agency, and their receipt is acknowledged by the lender.

You then upload the acknowledgments by running another concurrent process. The LOC or external lending agency may reject some of the origination records, in which case fresh origination records must be sent to the lender.

Prerequisites

Lender Codes, Guarantor Codes, Servicer Codes, and Lender Relationships must be defined.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Loans - Create Stafford and PLUS Applications from Awards

- Direct Loan - Create Loan Origination File

- FFELP - Create Loan Origination File

Requests - Concurrent Manager - Requests - Run (Request Set) - Submit Request Set window

- FFELP - Upload Origination Acknowledgments

- Direct Loan - Upload Origination Acknowledgment

Financial Aid - Loan Processing - PLUS/Alternative Borrower Information - PLUS/Alternative Borrower Information window

Financial Aid - Loan Processing - Loan Details - Loan Details window

Steps

1. To create loan records from award data, run the Loans - Create Stafford and PLUS Applications from Awards concurrent process by specifying the award year and optionally, fund code, and award ID.

   You must also specify whether you wish to get latest OSS information.

   Note: If you do not specify fund code or award ID, the process creates loan records for all funds and all awards.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To create direct loan origination records, run the Direct Loan - Create Loan Origination File concurrent process by specifying the award year and loan category and optionally, loan ID.

   Loan IDs are displayed in a list of values based on the award year and loan category selected. The loan IDs are of loan status Ready To Send.

   If you do not specify the loan ID, the origination file is created with all loan records pertaining to the loan category you specified.

Note: Direct loan origination records once sent to the LOC cannot be modified until they are acknowledged. You can make modifications to the existing records if they are accepted, and submit fresh origination records in case they are rejected.

3. To create FFELP loan origination records, run the FFELP - Create Origination File by specifying the award year, loan category, and optionally, the loan ID.

   Loan IDs are displayed in a list of values based on the award year and loan category selected. The loan IDs are of loan status Ready To Send.

   If you do not specify the loan ID, origination file is created with all loan records pertaining to the loan category you specified.

   FFELP records cannot be modified unless they are rejected. When FFELP records are rejected, a new origination record must be created and submitted to the lending agency.

4. To upload the direct loan origination acknowledgments received from the lending agency, run the Direct Loan - Upload Origination Acknowledgement concurrent process by specifying the data file with path.

5. To upload the FFELP origination acknowledgments received from the lending agency, run the FFELP - Upload Origination Acknowledgement concurrent process by specifying the data file with path.

6. To view the details of the borrower in the case of PLUS or Alternative loans, in the PLUS/Alternative Borrower Information, query on a person and view the details.

7. To view the origination record details, in the Loan Details window, click **Origination**. The Direct Loan Origination window appears.

Guidelines

The following statuses apply to loan origination records:

- Not Ready: some details are missing in the loan details form that is to be sent to loan origination; you can view these in the Reject Details window.

- Ready To Send: the Loans - Create Stafford and PLUS Applications from Awards concurrent process was run. You can change the status to Ready To Send from Rejected after making the necessary changes to make the record acceptable.

- Suspend: loan origination record is ready to be sent but user does not want to send it. You can change the status from Ready To Send to Suspend

- Sent: the loan origination concurrent process was run

- Accepted: the origination record is accepted by the LOC and the Direct Loan - Upload Origination Acknowledgment concurrent process or the FFELP - Upload Origination Acknowledgment concurrent process was run.

- Rejected: the loan details form is rejected by the LOC

- Terminated: the borrower has terminated the loan

- Canceled: the loan application is rejected

See Also

For general information on financial aid management, see Financial Aid Overview.

Modifying Direct Loan Origination Details

You can make changes to loan application records after the records are sent to and accepted by the LOC. For example, the award year or loan amount can change after the application is submitted. Any changes are communicated to the LOC by the school.

The changes made to the loan application records are collated and sent to the LOC for approval. When the LOC returns the records, either accepting or rejecting the change records, the data is uploaded into the system.

Prerequisites

Origination acknowledgements must be received and uploaded to the system.

The record to which changes are made must be in the status Accepted.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Loan Processing - Loan Details - Loan Details window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Direct Loan - Create Change Origination File

Requests - Concurrent Manager - Requests - Run (Request Set) - Submit Request Set window - Direct Loan - Upload Change Acknowledgements

Steps

1. In the Loan Details window, click **Origination**. In the Direct Loan Origination window, make the required changes to the loan record.

2. Save your work.

3. Click **Reject Details** to view the reason a record is rejected, and if required, send the origination records after modifications as described under Loan Origination.

4. To create direct loan change origination records, run the Direct Loan - Create Change Origination File concurrent process by specifying the award year and loan category.

   For information on running a concurrent process, see Concurrent Process Procedure.

5. When you receive acknowledgment of the changes, run the Direct Loan - Upload Change Acknowledgements concurrent process by specifying the data file with path. This updates the system with the changes accepted by the LOC.

Guidelines

This procedure only applies to direct loans: FFELP loan records cannot be changed once they are accepted by the lending agency.

See Also

For general information on financial aid management, see Financial Aid Overview.

Promissory Notes

A promissory note is a binding legal document specifying the terms of the loan and obligating the borrower to repay the loan. Financial aid supports the generation of a data view that can be used to fill in pre-printed direct-loan promissory note forms.

For the federal direct loan program, all promissory notes must be accompanied by a paper manifest that lists the borrower's name and identification number for each promissory note.

When the direct loan origination records are accepted by the LOC and the acknowledgments are uploaded into the system, the promissory note status becomes R (ready to print). You can generate promissory notes that are ready to be printed. When a manifest is generated for the promissory note, the status changes to Manifested.

When the institution receives promissory note acknowledgements from the LOC, they are uploaded into the system and the status of the promissory note is updated.

Prerequisites

Loan origination and change origination records must be returned by the LOC and uploaded into the system.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Loan Processing - Loan Details - Loan Details window

Correspondence - Correspondence Interaction History - Correspondence Interaction History window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

   - Direct Loan - Create Promissory Note Manifest

   - Direct Loan - Create Promissory Notes

Requests - Concurrent Manager - Requests - Run (Request Set) - Submit Request Set window

   - Direct Loan - Upload Promissory Note Acknowledgement

Steps

1. To create the data view used to fill in pre-printed direct-loan promissory notes, run the Direct Loan - Create Promissory Notes concurrent process by specifying the award year and loan category, and optionally, person number and loan ID.

   If you do not specify the person number or loan ID, the process generates promissory notes for all students for the award year and loan category specified.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To generate a promissory note manifest, run the Direct Loan - Create Promissory Note Manifest concurrent process by specifying the award year and loan category, and optionally, person number and loan ID.

If you do not specify the person number or loan ID, the process generates promissory notes for all students for the award year and loan category specified.

3. When LOC acknowledges the receipt of promissory notes, upload the data by running the Direct Loan - Upload Promissory Note Acknowledgements concurrent process by specifying the data file with path.

4. To view promissory note status of a particular loan record, click **Promissory Note Status** in the Loan Details window.

5. Click **Correspondence History** in the Loan Details window to view details of the correspondence carried out with the students in the Correspondence Interaction History window.

See Also

For general information on financial aid management, see Financial Aid Overview.

Loan Disbursements

Disbursement details pertaining to FFELP loans are sent along with the origination record. For direct loans, disbursement details are sent separately. Disbursement acknowledgments are uploaded by different processes.

For direct loans, the LOC sends year-to-date reconciliation data in summary as well as in detail. These are uploaded into the system as part of disbursement processing. You can also generate and send loan disbursement letters to the borrowers (student or parent).

You can also view or modify disbursement details pertaining to awards with status offered or accepted. You may also place or release disbursement holds. For information on disbursement holds, see Disbursements.

Prerequisites

Sending off letters to students/borrowers requires certain correspondence steps to be performed - such as the student's e-mail ID to be specified in the Person subsystem.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Loan Processing - Loan Details - Loan Details window

Financial Aid - Student Awards - Student Awards - Student Awards window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

    - Direct Loan - Create Disbursement Send File

    - Financial Aid - Loan Disbursement Letter

Requests - Concurrent Manager - Requests - Run (Request Set) - Submit Request Set window

    - FFELP - Upload Electronic Funds Transfer Roster

    - Direct Loan - Upload Disbursement Acknowledgements

    - Direct Loan - Upload Reconciliation Year-to-Date Detail

    - Direct Loan - Upload Reconciliation Year-to-Date Summary

Steps

1. To view disbursement details, click **Disbursement Details** in the Loan Details window. Depending on the loan type of the selected record, the Direct Loan Disbursements or the FFELP Disbursements window appears for viewing only.

    Alternatively, to modify disbursement details, select an award in the Student Awards window and click **Disbursement Details**.

    Include as planned credit indicates that the disbursement goes toward the planned credits of the student in student accounts. This is defined in the fund manager, but it can be overwritten.

    Note: Include as Planned Credit can be selected only when Disburse to Student Account is selected.

2. Make the required changes and save your work.

3. To send disbursement records to LOC, run the Direct Loan - Create Disbursement Send File concurrent process by specifying the award year.

    For information on running a concurrent process, see Concurrent Process Procedure.

4. To generate disbursement letters, run the Financial Aid - Loan Disbursement Letter concurrent process by specifying the document name, selection criteria, automatic term selection, delivery type, and award year.

Selection criteria determine whether you specify a List or a person number. You must specify either a list or a person number.

Delivery type can be email, fax, or print: you must specify the appropriate destination.

5. To upload direct loan disbursement acknowledgments, run the Direct Loan - Upload Disbursement Acknowledgements concurrent process by specifying the data file with path.

6. To upload FFELP disbursement acknowledgments, run the FFELP - Upload Electronic Funds Transfer Roster concurrent process by specifying the data file with path.

7. To upload reconciliation details, run the Direct Loan - Upload Reconciliation Year-to-Date Summary concurrent process and the Direct Loan - Upload Reconciliation Year-to-Date Summary concurrent process by specifying the data file.

See Also

For information on disbursements, see Disbursements.

For general information on financial aid management, see Financial Aid Overview.

Student Employment

Student employment includes a range of activities that help students secure on-campus and off-campus jobs. When employment involves Federal Work Study, strict federal regulations and procedures are applied to the disbursement and tracking of funds.

Student employment includes the following procedures:

■ Setting up External and Internal Jobs

■ Administering Work Study Programs

Student employment includes specifying the internal and external jobs available for the award year. Institutions track the progress of the work study awards provided as part of a student's financial aid package.

Student employment administration is shared by the Financial Aid office and employment or career services office. An interface with Oracle HRMS Payroll system or any external human resources management system facilitates the tracking of employment and payroll details.

Financial Aid allows you to create an authorization note for a student for each Federal Work Study award. There can be multiple authorizations for an award, one active authorization for each term.

The payroll system returns summarized pay period information for a student work study fund related job. This information can be uploaded as a batch process or manually through an interface in the payroll application. This information is stored and used to adjust the paid amount against the awarded work study fund.

Sending work authorization can be integrated with an external human resources payroll system. The system receives employee time sheets from the payroll system upon completing the authorization of student employment. For each pay period, employee time sheets can be uploaded from the integrated payroll system indicating information such as the job assignment, allocation, paid-to-date amount and pay rate.

You can view student job authorizations and payroll details, and also the student's progress toward the award amount for each term.

You can also view previous authorization records. The authorization details may change for a student if the work study award record is manually updated, or if a new work study award record gets created for the student award and term combination.

The external payroll system sends details of the amount paid as part of the work study award to the student. This amount is adjusted against the award amount accepted by the student for the work study fund in the award year.

The adjustment is done against the diminishing accepted amount. If the paid amount exceeds the accepted amount, the payroll upload is rejected. Every time a payroll is successfully uploaded, the remaining amount is reduced.

The payment upload process also initiates a workflow to intimate both the student and the employer that the student compensation is approaching the maximum eligibility for the fund in a particular term period as defined in the fund setup. For each work study fund, a notification limit is defined either as a percentage of the fund amount or as value in the Fund Manager. See Setting up Fund Manager and Award Groups.

Setting up External and Internal Jobs

Student employment administration involves specifying the on-campus and off-campus jobs available for the award year. As part of setting up external and internal jobs, you may have to set up organizational units too.

From time to time, you must also verify which jobs have been taken up, and mark them as closed.

Prerequisites

None.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Financial Aid - Student Employment - Student External and Internal Jobs - Student External and Internal Jobs window

Steps

1. To specify external and internal jobs available, query a unit code or click **Organization Details** to set up an organizational unit. For information on setting up organizational units, see Chapter 2, Program Structure and Planning.

2. In the Job Listings region, specify the job code and description, and work location.

   If the position is already taken up, select Closed.

3. In the Summary tab, specify the hiring supervisor details, pay range, work start date, and a long job description.

   Optionally, select Job Location and Development. This information is required by the federal government.

4. In the Details tab, optionally, select Help America Read Position to indicate that the job is a part of the Help America Read campaign or Community Service Position.

5. Enter the Skills Required and the Educational objective.

6. Save your work.

See Also

For general information on financial aid mangement, see Financial Aid Overview.

Administering Work Study Programs

Administering work study programs involves creating work authorizations from system award data and uploading them into an interface table. The information in the interface table is used by the integrated payroll system.

Another process is called at the time of payroll adjustment. It gets the notification details for the fund awarded to the student and checks for the limit. If the limit is reached or crossed, it triggers a notification.

Prerequisites

Payment information must be received from the external HR system.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Student Employment - Create Work Authorization File

- Student Employment - Upload Payroll Information

Financial Aid - Student Employment - Student Work Award Progress - Student Work Award Progress window

Steps

1. To send work authorizations, run the Create Work Authorization File concurrent process by specifying the Load Calendar.

   Optionally, to create a new work authorization or update an existing one for the term-wise earnings of a particular student, click the **Create Work Authorization** button in the Student Work Award Progress window.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To view details of a student's work study award details, query on a student in the Student Work Award Progress window.

This window displays details of the student, award year, fund information and all the term-wise actual student earnings for the award year.

It also displays the Progress Towards Limit, that is, the percentage of the total amount paid till date against the accepted amount.

3. To view the authorization history of the student's work study award, click **Authorization History**.

4. To upload payment details from an external HR system, run the Student Employment - Upload Payroll Information concurrent process by specifying the Batch ID of the interface table, Authorization ID, and the Validation Level.

Guidelines

Send Work Authorization concurrent process can be run for a specific student's term-wise earnings from the Student Work Award Progress window.

See Also

For information on interface with external payroll/HR system, see Oracle Student System Open Interfaces User's Guide.

For general information on financial aid mangement, see Financial Aid Overview.

Disbursements

Institutions maintain details of fund disbursements as part of financial aid management. Disbursement records are created on the basis of awards made to students from various funds at the institution's disposal. Routine maintenance includes viewing disbursement details and placing and releasing disbursement holds.

The Process Records concurrent process evaluates each disbursement transaction that has a transaction type of Planned to determine if the record should be passed to the Student Finance system. It determines if the student has sufficient credits or the required attendance type (from the disbursement detail or the fund manager) and also determines if the student has met the conditions of any Pays Only requirements. If all conditions are satisfied and the disbursement date has been reached, then the transaction type is set to actual, an adjustment detail record is created, which will populate the Student Finance system.

If a record already has a transaction type of Actual and the Verification Enforcement Date has been reached, the record is reevaluated for enrollment and Pays Only requirement. If the conditions are not satisfied at that time, the

disbursement is cancelled and an adjustment detail record is created which reverses the initial disbursement.

You can place disbursement holds or release holds placed as per progression rules. Disbursement holds also result from overawards during the awarding process.

You can post all eligible disbursement records to student accounts under student finance by running a concurrent process. Upon completion, the Amount Paid is updated in the disbursement details, the award record, and the fund manager for each transaction.

The output of the process updates the student finance subsystem.

Prerequisites

Award processing must be completed.

Responsibility

Oracle Student System Super User

Oracle Financial Aid Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Awards - Disbursements - Process Records

- Awards - Disbursements - Transfer to Student Account

Financial Aid - Student Awards - Student Awards - Student Awards window

Steps

1. To create disbursement records, run the Awards - Disbursements - Process Records concurrent process by specifying the award year.

   The Run For parameter specifies whether you wish to run the process for a person, person ID group or fund code.

   Specify either the person number, person ID group, or fund code as per the Run For parameter you specified.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. To view or modify disbursement details, select an award record and click Disbursement Details in the Student Awards window. Depending on the fund code of the award record, the following disbursement windows appear:

   If the fund code is FLS, FLU, FLP, or ALT, the FFELP Disbursements window appears. For information, see Loan Disbursements.

   If the fund code is DLS, DLU, or DLP, the Direct Loan Disbursements window appears. For information, see Loan Disbursements.

   If the system fund code is Pell, the Pell Disbursements window appears. For information, see Maintaining Pell Disbursement Details.

   If the fund code is FWS, the Disbursement Details button is disabled.

   For all other fund codes, the General Disbursements window appears.

3. Query a person to view or modify the disbursement details

   Offered amount can be modified for the specific disbursement.

   You can modify the cumulative credit points required only if the eligibility is set up as credit points in the fund manager.

   You can also modify the Expiration Date, Enforcement Date (date when the rechecking of attendance eligibility is performed), and the Revision Code.

   Select the Include As Planned Credit check box to indicate that the disbursement is to be made against planned credit.

   Note: Include as Planned Credit can be selected only when Disburse to Student Account is selected.

   Select Force if you wish to override any eligibility checks and force the record to student finance.

   The Hold check box indicates that a disbursement hold exists.

4. Click **Holds** in the General Disbursements window to view or release holds.

   You can also enter a reason for releasing the holds.

5. To view adjustment details, click **Adjustment Details** in the General Disbursements window.

   If you click Adjustment Details in the Direct Loan Disbursements window, then the Adjustment Details window appears with a Direct Loan tab, in which direct loan adjustment details are displayed.

6. To transfer disbursement details to student accounts under student finance, run the Awards - Disbursements - Transfer to Student Accounts by specifying the award year and one of person number person group, fund code, or term calendar.

   The unique credit ID of the transaction that updates Student Finance is recorded in the invoice details tab of the Adjustment Details window.

   Financial credits in the actual status are transferred to Students Account and the Credit records are created in the Credits table with payment date as the current system date. The effective date of the credit record is the current system date.

See Also

For general information on financial aid management, see Financial Aid Overview.

8

Academic Records

Institutions maintain academic records of students for advanced standing granted, unit assessments, progression, and identifying and awarding eligible graduates.

Academic Records includes:

- Academic Records Overview
- Evaluating Applications for Advanced Standing
- Assessing a Unit Attempt
- Applying Progression Rules and Outcomes
- Applying Program Completion Rules
- Managing Graduation
- Degree Audit
- Order and Produce Documents

Academic Records Overview

Prior to and after a student's enrollment, an institution keeps track of student records. At the time of admission and enrollment, institutions evaluate student application for advanced standing, and grant or reject advanced standing. After enrollment, institutions assess student progress, apply progression rules and outcomes, and send notifications to students regarding outcome decision. They manage examinations, and calculate and maintain student academic statistics. Institutions also identify eligible graduates on whom to confer graduation.

Maintaining academic records involves the following:

- Advanced Standing

- [Assessment](#)
- [Progression and Program Completion](#)
- [Graduation](#)
- [Degree Audit](#)
- [Order and Produce Documents](#)

Advanced Standing

Advanced standing considers a student's prior education or experience for enrollment in a program. Students can apply for advanced standing based on prior units or exams taken. For example, a student may have completed a unit in engineering basics, so may not have to do it in the engineering program applied for. Similarly, scores achieved on a scholastic assessment test or a graduate record exam, may entitle a student to credit points.

Figure 8–1 shows the advanced standing process.

Figure 8–1   Advanced Standing Process
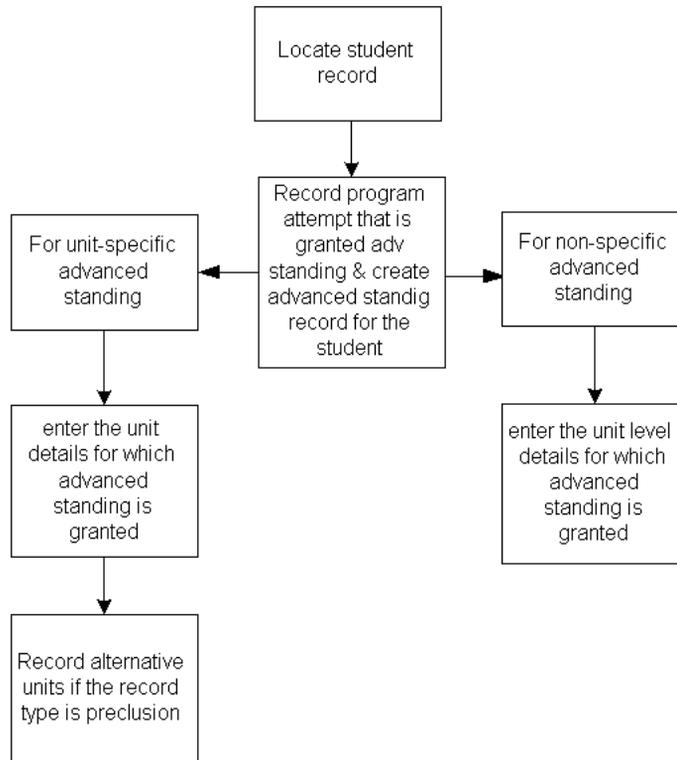
Assessment

Institutions assess the progress of a student in the enrolled unit. Assessment types can be examinable or non-examinable, and are attached to assessment items. Examples of assessment types include assignment and oral exam. An assessment item is an occurrence of an assessment type, and comprises a single piece of assessment that a student may have to complete. An assessment pattern with different items attached to it is assigned to a unit.

Grading schemas are a set of grades, marks, or pass and fail values. They are attached to units, unit sections, and assessment items. Grades within a schema are assigned ranks. When multiple grading schemas exist, students can, through self-service choose one they find easier to relate to. In such cases, the grade in the default grading schema is translated into the one the student has chosen.

External grades, equivalent to the institution's internal grading schema grade, are used to publish grades in newspapers. Institutions may use anonymous grading to avoid bias during assessment. Anonymous grading can be program-based, unit section based, or assessment- item based. If units are repeatable, the grading process considers student's previous grades and advanced standing units for grade calculation. The aggregate of student grades is calculated to produce the grade point average (GPA) for the total study load attempted.

Grade rosters, which are registers maintaining a list of grades for each unit section, are produced in self-service. Instructors enter grades for the students in these rosters. Instructors may apply for a change in grade through self-service if student expresses dissatisfaction with the grade.

For selective grading of students, institutions define grading period cohorts. These are groups with attributes like program, unit set, academic standing, class standing, and person ID group. For example, institutions may want to grade students in the cohort with class standing of freshman. Class standing indicates a student's position in the enrolled program. For example, a student with less than 30 credits is a freshman, one with credits between 31 and 60 is a sophomore, 61 to 90 is a junior, and above 90 is a senior. A unit set comprises a group of units that lead to majors, minors, or specialized certifications.

Progression and Program Completion

When a student enrols in a program offering option, that is, a program offered in a particular location with an attendance mode and attendance type, it is considered a program attempt. For example, a student is enrolled in a BA History program, being offered in Belmont with an on-campus attendance mode and a full-time attendance type. Similarly, when a student enrols in a unit offering option, it becomes a unit attempt.

Institutions define progression rules to evaluate a student program attempt. Evaluation occurs in two phases - applying progression rules and applying outcomes. When a progression rule is applied, the associated outcomes are attached to the student unit attempt. Positive or negative outcomes, such as awards or penalties, are attached to rules. Negative outcomes in turn have academic holds attached. If a progression rule has more than one outcome attached, ranks are assigned to outcomes in order of priority.

Outcomes have different attributes like number of failures, failure type, duration, and duration type. The failure type can be Repeated or Consecutive. A student may fail in consecutive periods or at random. An Effective duration type indicates that

the outcome is valid only for enrolled terms. A Normal duration type considers the duration period regardless of effective enrollment.

Progression is also measured through degree audit using a third-party software. It calculates the GPA and identifies the number of credits required for program completion. It is also used to evaluate advanced standing for transfer units.

Institutions can define program completion rules for a program version, program stage, or unit set to monitor progress and identify eligible graduates.

Figure 8–2 shows the process by which progression rules are created and applied to student program attempts.

Figure 8–2   Progression Process
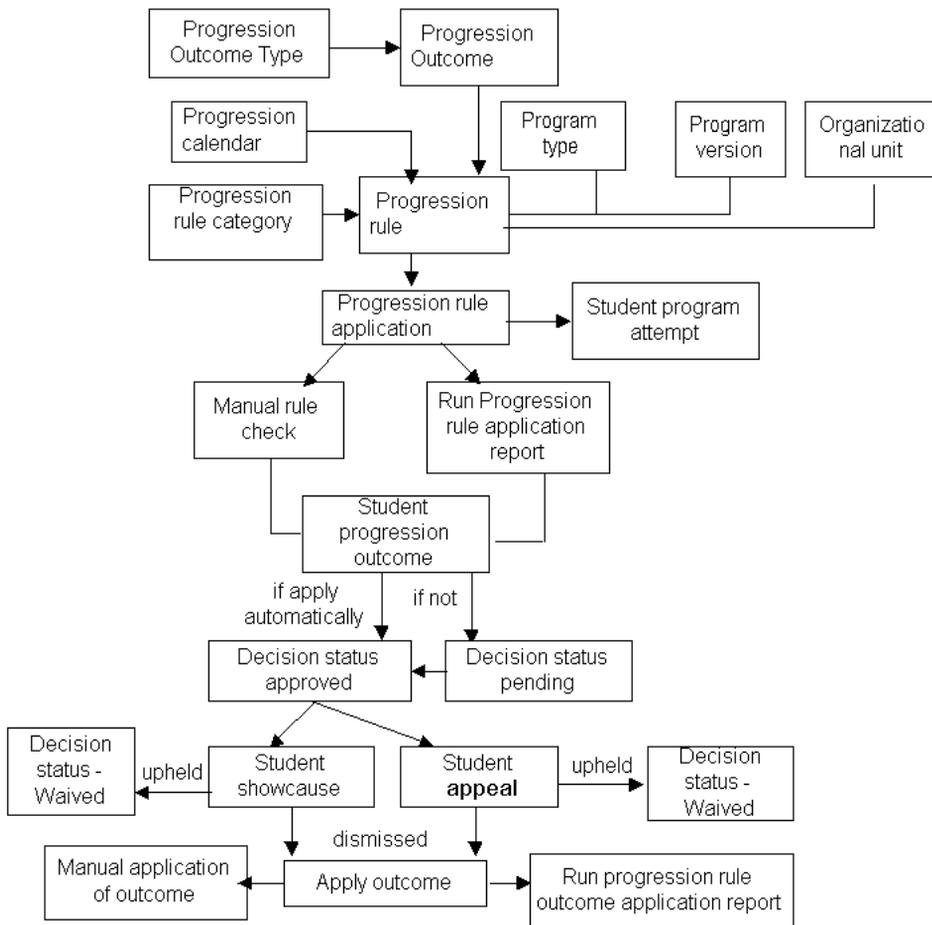
Graduation

Institutions conduct graduation ceremonies to confer graduation on eligible graduands. A proxy award is given when another person represents the graduand at the ceremony. Graduands are conferred an honors level award for programs that require exceptional performance. Special awards like medals and prizes are also given. Students opting for combined degrees, for example, a B.Com/B.Sc degree, receive more than one award and can be assigned to different ceremonies.

Graduands can forgo an award to pursue a higher level program or opt for a lower level award as an alternative exit.

Figure 8–3 shows the graduation process.

Figure 8–3   Graduation Process
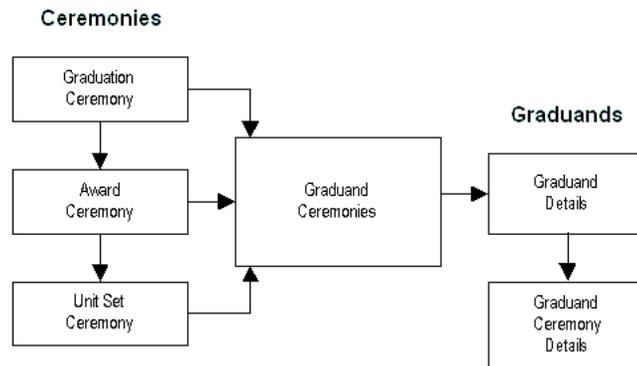
Degree Audit

Degree Audit is a function to evaluate a student's current or expected program work against the institutions's requirements for an academic program. 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 home institution. An Oracle Student System-degree audit application interface is used to pass student information stored in Oracle Student System such as person ID, address, program, units, and course-like units, such as test scores, to a third-party degree audit software as well as return key information from the degree audit run to update Oracle Student System.

Order and Produce Documents

On program completion, students can order transcripts via self-service. Institutions offer different transcript service plans like, free transcripts and lifetime transcripts. Students can choose a plan through self-service and are charged a fee accordingly. Sometimes students opt for a lifetime transcript plan and later on cancel it. Students must pay document fee if they request for documents beyond the limit of the transcript service plan chosen.

Evaluating Applications for Advanced Standing

Institutional faculty evaluate and grant advanced standing if a student's prior education is equivalent to components of the current program.

Advanced standing is of two types: credits and preclusion. An institution can grant unit credit and exempt a student from an entire unit or grant partial credit. When precluding from a unit, they give an option of alternate units. Advanced standing can also be considered for student progression.

Institutions, sometimes, are unable to match a student's previous unit completion with a unit in the present program attempt. Then advanced standing is granted at unit level and not to a particular unit.

Institutions track advanced standing awarded, expired, and those not granted.

Prerequisites

Advanced standing types must be defined.

Advanced standing details with the expiration date increment must be configured.

Academic history must exist for the student.

Responsibility

Oracle Student System Super User

Navigation

Academic Records - Advanced Standing - Advanced Standing Details window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Process Advanced Standing Eligibility

- Expire Advanced Standing

- Advanced Standing Awarded

- Advanced Standing Granting Report

Steps

1. Query the person number in the Find Person window or the Advanced Standing Details window.

2. Select the Institution Name where the student completed previous units if different from the default exemption institution.

3. Save your work.

4. Click **Exam Articulation Details** to view exam details in the Advanced Standing Articulation Details window.

   The previous exam details are entered as part of exam details in admission tests. For information, see Chapter 4, Admissions, Processing Applications.

5. Click **Unit Articulation Details** to view previous unit details in the Advanced Standing Articulation Details window.

   The previous unit details are entered as part of student academic history during admission. For information, see Chapter 4, Admissions, Maintaining Academic History.

6. Click **Unit Details** to enter details in the relevant tabs of the Advanced Standing Unit Details window.

   The expiration date in Other Details tab indicates the date after which the status will be changed to expired through the Expire Advanced Standing concurrent process.

   Note: Students can enrol in alternate units only if advanced standing type is preclusion.

7. To offer advanced standing at unit level, click **Unit Level Details** and enter relevant details in the Advanced Standing Unit Level Details window.

8. Save your work.

9. Run the Process Advanced Standing Eligibility concurrent process to update the advanced standing status to Granted.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: The approved advanced standing must not exceed the credit limit set for the program version, and the status of the student program attempt must be enrolled.

10. Optionally, manually update the status to Granted in the Unit Details tab of the Advanced Standing Unit Details window.

11. Run the Expire Advanced Standing concurrent process to update an Approved status to Expired if the current date falls after the specified expiration date.

12. Run the Advanced Standing Awarded concurrent process to track advanced standing awarded for a person number.

13. Run the Advanced Standing Granting Report for a report on advanced standings granted and not granted.

Guidelines

Advanced standing has different statuses:

- Approved when institutions evaluate and approve student application

- Granted when advanced standing is approved and applied to a student program attempt

- Cancelled when student withdraws a request for advanced standing

- Revoked when institution withdraws approved advanced standing

- Expired when advanced standing is not granted before the expiration date

See Also

For general information on Academic Records, see Academic Records Overview.

Assessing a Unit Attempt

Institutions maintain and track student assignments and examinations, evaluate applications for special consideration, and assign outcomes to student unit attempts.

Assessment includes the following:

- Attaching Assessment Items and Patterns

- Approving Applications for Special Consideration

- Grading

- Managing Examinations

- Academic Statistics

Institutions create assessment patterns to attach a number of assessment items to a unit. Student assignments have tracking items attached to track various stages like assignment received from student, sent to assessor, received from assessor, and returned to student. Institutions evaluate applications for special consideration and assign outcomes.

For examinable assessment items, institutions manage the examination material, time table, venues, sessions, and supervisors. They calculate student academic statistics and can choose whether or not to display student's class rank in the transcript. Class rank indicates a student's academic performance in comparison to a group of students in the cohort.

Attaching Assessment Items and Patterns

Assessment patterns with associated items are attached to units. When a student enrols in a unit, the default assessment pattern and associated items attached to a unit are assigned to the student unit attempt. You can also attach assessment items and patterns directly to a unit attempt.

Prerequisites

Assessment items, types, patterns, and assessor types must be defined.

Assessment calendar must be configured with the assessment item variation cutoff date alias, grade or marks submission start and end date aliases.

Grading schema must be defined. Mark and grade entry must be configured.

Responsibility

Oracle Student System Super User

Navigation

Academic Records - Assessments - Unit Assessment Items Query window

Academic Records - Assessments - Student Unit Assessment Patterns window

Academic Records - Assessments - Student Unit Assessment Items window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Automatically Maintain Student Unit Attempt Assessment Items

- Apply Unit Assessment Item Modification to Students

Steps

1. Query the unit to view unit assessment item details in the Unit Assessment Items Query window.

2. To attach assessment pattern to a student unit attempt, query the person number in the Student Unit Assessment Patterns window.

3. Enter the assessment pattern or select in the Unit Assessment Pattern Inquiry window.

4. Attach an assessment item to a unit attempt in the Student Unit Assessment Items window.

5. Optionally, click **Student Unit Assessment Items** in the Student Unit Assessment Patterns window to attach an assessment item to a unit attempt.

6. Save your work.

7. Click **Outcome History** to view details of existing outcomes for an assessment item in the Student Assessment Items Outcomes History window.

8. Run the Automatically Maintain Student Unit Attempt Assessment Items concurrent process to assign default assessment items and patterns to a student unit attempt.

   For information on running a concurrent process, see Concurrent Process Procedure.

9. Run the Apply Unit Assessment Item Modification to Students concurrent process to update student unit attempt with changes in assessment items or patterns.

   Note: A unit attempt is updated when assessment items or patterns are added to or deleted from a unit, or when the location and unit class of an assessment item or pattern are changed.

   Note: An assessment item variation cut-off date alias is defined to restrict changes in assessment items. For example, an institution may not want changes in the assessment requirements after the second week of the teaching period.

Guidelines

The faculty or the administrator can view the student list in self-service. They can view the list of students who are enrolled, waitlisted, discontinued, dropped, or those who completed the program. The self-service page also displays list of students who enrol in a program only for auditing purpose rather than for earning credit points.

Web ADI is a functionality where information is downloaded into an excelsheet. The instructor or faculty enters grades/marks for the students and it is uploaded back into Oracle Student System.

See Also

For general information on Academic Records, see Academic Records Overview.

Approving Applications for Special Consideration

Students may apply for special consideration if they feel that circumstances have prevented them from completing an assessment item or affected their performance in it. Examples of such situations are family emergency, work pressure, or illness. Institutions review these applications and assign final outcomes like successful unit completion or unsuccessful unit completion.

Prerequisites

Assessment items, types, patterns, and assessor types must be defined.

Assessment calendar must be configured.

Grading schema must be defined. Mark and grade entry must be configured.

Special consideration categories and outcomes must be defined.

Responsibility

Oracle Student System Super User

Navigation

Academic Records - Assessments - Special Consideration Application Details window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Applications for Special Consideration in Assessment

- Special Consideration Outcome Report

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.

   Note: You can enter special consideration applications only for confirmed and enrolled student unit attempts, and not for discontinued, unconfirmed, invalid unit attempts

3. Optionally, enter the application details, sought outcome, and actual outcome.

   Note: 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. Run the Applications for Special Consideration in Assessment concurrent process to view details of students who applied for special consideration.

   For information on running a concurrent process, see Concurrent Process Procedure.

7. Run the Special Consideration Outcome Report concurrent process to view details of student applications for special consideration and respective application statuses.

See Also

For general information on Academic Records, see Academic Records Overview.

Grading

Grading schema are attached to units and assessment items. Students are graded for a unit or for a particular assessment item in a grading period. The institution provides cover sheets for student assignments to file assignment records. In anonymous grading, an anonymous number is used to substitute a student's name, an exam, or assignment.

Incomplete grades are assigned when a substantial portion of the program work has been satisfactorily but not entirely completed. In such cases, a default grade is assigned before a specified date. Students have invalid grades when the unit attempt outcomes have incompatible mark and grade. That is, the recorded grade is not within the mark range for the specified grade in the grading schema. For example, the mark range assigned for a grade A is 80 - 90, but a unit attempt with a mark range of 60 - 70 is assigned grade A.

Unit attempts are assigned outcomes after grade calculation. Institutions can override the outcomes if they are not finalized. You can also assign outcomes to non-enrolled student unit attempts. A non-enrolled unit attempt is one where a student is enrolled in a different unit offering option, that is, the same unit with a different combination of location, attendance mode, or attendance type.

Prerequisites

Grading schema must be defined.

Unit section should have a lead instructor.

Date alias for the start and end of grading periods must be defined.

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Maintain Anonymous ID

- Initiate Tracking Items for Assignments

- Produce Student Assignment Cover Sheet

- Assignment Due Date Summary Report

- Generate Assessment Notifications

- Assessment Item Outcome Upload and Validation Process

- Assessment Item Outcome Exception Report

- Grading Period Grade Upload and Validation Process

- Invalid Grade Report

- Incomplete Grade Process

- Unit Review Report

- Unit Attempt Outcome Notice board Report

- Non-enrolled Student Outcomes Report

- Insert Administrative Grades

Academic Records - Assessment - Student Unit Attempt Outcomes window

Requests - Enrollment History - Student Unit Attempt Outcome - Student Unit Attempt Outcome History window

Academic Records - Assessment - Non Enrolled Student Outcomes window

Steps

1. Run the Maintain Anonymous ID concurrent process to assign anonymous IDs to students, assignments, or examinations for anonymous grading.

   For information on running a concurrent process, see Concurrent Process Procedure.

2. Run the Initiate Tracking Items for Assignments concurrent process to create tracking items for student assignments.

3. Run the Produce Student Assignment Cover Sheet concurrent process to create an extract file with student assignment records and enable the printing of cover sheets and create correspondence item record for cover sheet.

   Note: Cover sheets can be produced only for assignments with associated tracking items.

4. Run the Assignment Due Date Summary Report concurrent process for a report on the assignments due for an assessment period. This report facilitates resource allocation for assignment tracking.

5. Run the Generate Assessment Notifications concurrent process to send notifications to faculty regarding grading and attendance recording to be done for different grading periods.

6. Run the Assessment Item Outcome Upload and Validation Process concurrent process to import assessment item outcomes from interface tables.

7. Run the Assessment Item Outcome Exception Report concurrent process for a report on assessment item outcomes that failed validation and upload.

8. Query the student unit attempt to assign grades in Student Unit Attempt Outcomes window. Select Finalized if grade is finalized.

   Note: You may view the history of the outcomes in the Student Unit Attempt Outcome History window.

9. Select person number and unit code in Non Enrolled Student Outcomes window to assign grade or mark to student unit attempt.

10. Run the Non-enrolled Student Outcomes Report concurrent process for a report on outcomes of non-enrolled students.

11. Run the Grading Period Grade Upload and Validation Process concurrent process to import grades from interface tables.

12. Run the Invalid Grade Report concurrent process for a report on grades with incompatible mark range.

13. Run the Incomplete Grade Process concurrent process to identify incomplete grades for which the deadline to assign grades expired and assign the default grade.

14. Run the Unit Review Report concurrent process for a report on the recommended marks and grades and finalized marks and grades.

15. Run the Unit Attempt Outcome Notice board Report for a list of outcomes to be displayed on notice board for an assessment calendar.

16. Run the Insert Administrative Grades concurrent process to assign grades to student unit attempts that are non-assessable or those that don't have grades.

See Also

For general information on Academic Records, see Academic Records Overview.

Managing Examinations

As part of student assessment, institutions conduct exams, schedule venues and examination sessions, organize examination material and seating allocation, and assign supervisors to exams.

Prerequisites

Examination supervisor types and material types must be defined.

Responsibility

Oracle Student System Super User

Navigation

Academic Records - Assessment - Examination Timetable - Student Examination Details window

Academic Records - Assessment - Examination Timetable - Venue Session Availability - Venue Availability window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Required Examinations Report

- Exam Attendance Rolls

- Default Exam Venue Session Availability

- Seating Allocation Report

- Exam Supervisor Labels

- Examination Packaging Labels

- Result Sheet

- Result Entry Control Sheet

- Unit Clash Report

Steps

1. Run the Required Examinations Report concurrent process for a report on the examinations to be scheduled.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: In the profile Concurrent:Directory for Copy, specify the directory to which the data must be saved as a text file, if the text file option is Yes.

2. Run the Exam Attendance Rolls concurrent process for a list of expected students attending an examination at a specific venue and session.

   Note: Examination supervisors use this list to record student attendance.

3. Run the Default Exam Venue Session Availability concurrent process to assign open venues to examination sessions assuming that all venues are available.

4. Optionally, manually assign venues to examinations in the Venue Availability window.

5. Run the Seating Allocation Report concurrent process for details on seating allotted to students for an examination venue.

   Note: You can override the system-assigned seat number in the Student Examination Details window.

6. Assign examination timeslot and duration to students in the Student Examination Details window.

7. Run the Exam Supervisor Labels concurrent process to mail external examination papers and examination session information to examination supervisors.

   Note: To receive these, the examination supervisors must have a correspondence address.

8. Run the Examination Packaging Labels Report concurrent process to produce labels for examination material packages sent to examination location supervisors.

9. Run the Result Sheet concurrent process to produce mark sheets.

10. Run the Result Entry Control Sheet concurrent process for a list of all the mark sheets produced.

11. Run the Unit Clash Report concurrent process for a report on units scheduled in different examination periods and units with scheduling conflicts.

See Also

For general information on Academic Records, see Academic Records Overview.

Academic Statistics

Institutions record and maintain student academic statistics that are viewed through self-service. The statistics are derived based on criteria like credit points attempted and earned, GPA, progression status, program status, attendance type, class standing, and advanced standing. Class rank cohorts with rules attached are defined to assess student's performance against the rest of the class. A process is run to assign ranks to students based on a selected GPA. Based on the rule attached to the cohort, the process filters students for ranking. For example, the rule considers only sophomores. The process is run for a calendar instance and for cohort instances that are not frozen. If the process is rerun, the existing ranks are overridden and fresh ranks provided. You can manually override these ranks. You can choose to display class ranks on transcripts or in the self-service academic history page.

Each unit is assigned a program level like a graduate or undergraduate. For example, BA-Psychology is assigned an undergraduate level in the BA program. If the student's career is postgraduation, this unit is not part of the student's career statistics and does not appear in the transcript. However, institutions can override this definition.

Prerequisites

IGS - Class rank cohort management profile must be set. Class rank cohorts must be defined.

Career - program relationships must be defined.

Responsibility

Oracle Student System Super User

Navigation

Academic Records - Academic Statistics - Class Rank Cohorts window

Academic Records - Academic Statistics - Student Program/Unit Relationship Exceptions window

Steps

1. Click **Run Rankings** in the Class Rank Cohorts window to run the process assign ranks to students based on the selected GPA.

   Note: The process should not be run when both the cohort status and rank status are Frozen and Finalized.

2. Click **View/Override Class Rank** to view or override the ranks in the View/Override Class Ranks window.

   Note: To override a calculated class rank, the profile name IGS: Class Rank Override must be set to Yes.

3. Override the career-program relationships in the Student Program/Unit Relationship Exceptions window.

See Also

For general information on Academic Records, see Academic Records Overview.

Applying Progression Rules and Outcomes

Institutions define progression rules to monitor and evaluate student performance. Oracle Student System uses the rules defined to check the academic progress of students and assign corresponding outcomes to program attempts for a progression period. Prior progression period outcomes and advanced standing units can also be considered in the evaluation of student's academic progress.

Applying progression rules and outcomes involves:

- Applying Progression Rules

- Applying Outcomes

Progression must be configured at a systemwide level to establish the default progression periods for the whole institution. You can override system-level

progression periods with progression periods at the organizational-unit level or program-version level.

Outcomes are of different types like, exclude from funds; exclude or suspend from unit, unit set, or program; and hold a student from enrolling into a specific program, etc. When a student enrols for a program, the progression rules attached become applicable to the student program attempt. When a progression rule outcome is applied, the holds attached to the outcome are also applied to the student program attempt. All academic holds are applied and released through the progression subsystem only. Sometimes institutions might find it necessary to apply holds on students regardless of progression rules. This is when they apply outcomes manually to student program attempts.

Outcomes are assigned at three levels: progression rule category, progression rule, and progression rule application. When progression rules are applied, a student may fail more than one rule with different outcomes. The institution may then choose which outcomes to apply. You can define outcomes such that the student has an opportunity to show cause or appeal. An institutional committee examines a student's explanation and makes a decision on the outcome. The committee can approve, waive, cancel, or remove the outcome. The student is notified of the outcome. Progression rules can also be positive in nature. When an institution wants to grant an award to students satisfying some criteria or rule like earned credit points greater than 90, it may define a progression rule for the program version and associate an appropriate outcome.

Applying Progression Rules

Progression rules are grouped into rule categories like credit-based, GPA-based, grade-based, or mixed rules, and have different calendars and outcomes attached. You can attach progression rules at three levels: organizational unit, program type, or program version. The attached progression rules are applied to student program attempt.

The administrator can define new progression rules and attach them to program types, program versions, or organizational units, as and when required by the institution.

Progression rules are of two types: general progression rules and application-specific rules. General progression rules that are predefined can be used at any of the levels, unlike rules defined for a specific program type, version, or organizational unit. 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 process to apply for a batch of student program attempts.

Prerequisites

Progression rule categories and progression calendar must be defined.

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Basic Program Details window

Program Structure and Planning - Program - Program Types window

Setups - Organizational Structure - Organizational Structure Setup window

Academic Records - Progression - Student Progression Rule Check window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Progression Rule Application Report

Steps

1. To attach a progression rule, query the program code in the Basic Program Details window. Click **Other Program Detail** and click **Progression Rules**.

2. Enter the rule details in the Progression Rule Applications window.

3. Save your work.

4. Click **Progression Calendar** to attach the rule to a calendar and click **Back**.

5. Click **Progression Outcomes** to attach outcomes to progression rule in the Progression Rule Outcome window. Save your work. Based on the outcome type selected, click relevant buttons to enter details of the outcome.

6. To define a progression rule for a program type, query the program type in the Program Types window and click **Progression Rule**.

7. To define a progression rule for an organizational unit, select the institution in the Organizational Structure Setup window, select the organizational unit for the institution, and click **Progression Rules**.

8. To apply progression rules to a student program attempt, 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.

Note: 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.

9. Select a progression period and click **Manual Rule Check** to apply progression rules to a student program attempt.

   Because it is a manual rule check, the System Check Type is displayed as Manual. Select Show All to view the number of instances a rule is applied.

   Note: A progression rule defined at the program-version level overrides the one defined at organizational-unit level if the rules belong to the same rule category.

10. Click **Rule Application Detail** in the Student Progression Period region to view all rules applied to a student program attempt.

11. Click **Student Unit Attempt** to view details of student unit attempts.

12. Select 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.

13. View rule message for failed rules in the Rule Message tab.

14. Run the Progression Rule Application report concurrent process to apply progression rules for a batch of students.

   The System Check Type 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.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: The process applies progression rules to student program attempts, updates their progression status based on the result of this rule evaluation, and provides a report.

Guidelines

A student can have different progression statuses like:

- Goodstand when student progression is satisfactory

- Suspension when a student is suspended from a program or unit

- Probation when a student is on probation

- Exclusion when a student is excluded from a unit, unit set, or program

- Expulsion when a student is expelled from the institution

- Show cause when student is eligible to explain why a given outcome is inappropriate

- Under Consideration when a progression rule outcome is under consideration

See Also

For information on outcomes, see Applying Outcomes.

For general information on Academic Records, see Academic Records Overview.

Applying Outcomes

When progression rules are applied and the student fails the rule, corresponding outcomes are applied to the program attempt.

You can apply outcomes in three ways:

- to a batch of students

- manually to a student within the context of a rule

- manually to a student without the context of a rule

Sometimes faculty use a spreadsheet to assign outcomes to student records. These records can be uploaded into an interface table and imported into Student System.

All outcomes must be approved before they can be applied. Based on the outcome definition, students can show cause or appeal before and after an outcome is applied. Institutions may either accept or dismiss them and update the outcome decision. 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.

Prerequisites

Progression outcome types must be defined.

Responsibility

Oracle Student System Super User

Navigation

Academic Records - Progression - Student Progression Rule Check window

Academic Records - Progression - Student Progression Outcome Decision - Progression Outcome Decision window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Progression Rule Outcome Application Report

- Progression Outcome Upload and Validation Process

- Progression Outcome Exception Report

- Progression Maintenance Process

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 click **Manual Outcome**. Select the Outcome type and enter the Duration and Duration type in the Student Progression Outcome window.

3. To apply outcome of a progression rule, select a Progression Rule Category and click **Student Outcome**.

   Note: Progression rules must first be applied. To apply progression rules, see .

   Change the Duration and Duration Type if desired. Select the decision status Approved.

   Note: The decision status must be changed to Approved before the outcome is applied.

4. Based on the outcome type selected, the **Excluded/Suspended Programs, Excluded Unit Sets, Excluded/Required Units, Excluded from funds, Hold,** and **Awards** buttons are enabled or disabled. Click relevant buttons to limit outcome.

   Note: Varied in the Decision tab is automatically selected if you override the outcomes already existing for the outcome type.

5. Enter restrictions, decision, show cause, and appeal in relevant tabs. In the Application tab, enter expiration date and click **Apply** to apply outcome.

   Note: The Restrictions tab is enabled if the outcome type has holds attached to it.

6. Click **Student Outcome Rule** to create outcome-related progression rules in the Progression Rule Applications window.

7. Click **Student Rule** to add rules to the program attempt in the Progression Rule Applications window.

8. Enter organizational unit and progression period in the Progression Outcome Decision window to apply outcomes to a batch of student program attempts. Click **Retrieve Records** to display student records. Select Approve or Waive to change decision status of an outcome and click **Process** to apply.

9. Run the Progression Outcome Upload and Validation Process concurrent process to import progression outcomes from an interface table.

   For information on running a concurrent process, see Concurrent Process Procedure.

10. Run the Progression Outcome Exception Report concurrent process for a report on the records that failed validation, and thus, could not be imported.

11. Run the Progression Rule Outcome Application Report to apply all Approved outcomes to student program attempts.

    Note: The progression outcomes resulting from the Progression Rule Application Report concurrent process must be manually approved in the Student Progression Outcome Decision window before running this process.

12. Run the Progression Maintenance Process concurrent process to track and update changes in student progression statuses and outcome expiry dates.

    Note: The process identifies applied student progression outcomes of type Probation, Suspension, or Manual and records the expiry dates. It updates the student progression status based on the progression outcome applied.

Guidelines

Outcome types can be:

- Expulsion to expel a student from the institution

- Exclusion to exclude a student from a program group, program, unit set, or unit

- Suspension to suspend a student from a program

- No penalty to issues a warning to the student without any penalty

- Probation to place a restriction or requirement on the student's enrollment

- Manual to apply outcome manually

The outcome decision status can be:

- Pending by default. If outcome type is defined as Apply Automatically, the decision status becomes Approved

- Waived when multiple outcomes are attached and the institution chooses to waive some

- Cancelled after a successful student appeal

- Removed as an administrative decision by the institution

See Also

For information on progression rules, see Applying Progression Rules.

For information on holds, see Chapter 3, Person Reference, Holds.

For general information on Academic Records, see Academic Records Overview.

Applying Program Completion Rules

Institutions check the program completion status of students by applying the completion rules attached to identify eligible graduates.

Institutional administrative staff defines rules for completing a program attempt or unit set attempt. Completion rules are defined at three levels: program version, program stage, and unit set. The rules defined 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 student program attempt or unit set attempt.

Prerequisites

Completion rules must be defined at either program version, program stage, or unit set level.

If alternative exit is provided for a program, completion rules must be defined for alternative exit.

Responsibility

Oracle Student System Super User

Navigation

Academic Records - Progression - Program Completion Query - Progression Completion Query window

Academic Records - Progression - Student Program Attempts - Complete Student Program Attempts window

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.

   Note: The **Program Stage**, **Unit Set**, and **Alternative Exit** buttons are enabled if they are defined for the displayed program version.

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. 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.

   A message is displayed indicating whether the rule is completed or not.

   Note: Manually Completed is automatically selected for program stage in case of manual program completion, overriding the completion rules.

4. Select Predictive to check completion rules for a unit set attempt with an Enrolled status. Running in predictive mode allows institutions to identify eligible graduates.

5. Query the person number in the Complete Student Program Attempts window.

   Select Requirements Complete to indicate that program completion requirements are satisfied. Save your work.

6. Click **Unit Set Attempt** and select Completed in the Unit Set Attempt window.

7. If program has an alternative exit, click **Alternative Exit** and select Requirements Complete.

8. Save your work.

9. If a unit set is available for the alternative exit, click **Unit Set Attempt** to complete the requirements.

10. Click **Academic History** to view the academic details in the Student Program Attempt window. For information, see Chapter 5, Enrollments, Enrolling Students.

See Also

For general information on Academic Records, see Academic Records Overview.

Managing Graduation

Graduation marks the student's successful completion of a program. Institutions identify eligible graduates, conduct a graduation ceremony, and confer honors on them.

A graduation ceremony is associated with a ceremony round having a completion period and year. Ceremonies are conducted at different venues and locations if the graduation process is decentralized or if students from different campuses graduate during the same period. Institutions approve graduand eligibility, and assign them to ceremonies. Institutional councils can approve the formal graduation conferral and assign conferral dates. They assign presentation order numbers to graduands by award and unit sets. Graduands either attend the ceremony or receive the award in absentia.

You can manually assign graduands to ceremonies or run a process to do the same.

Prerequisites

Graduand statuses and graduand approval statuses must be defined.

Graduation calendar with date aliases must be defined.

Awards must be defined. Honors level must be defined for honorary awards.

Responsibility

Oracle Student System Super User

Navigation

Academic Records - Graduation - Graduation Ceremony window

Academic Records - Graduation - Graduand Ceremony Details window

Academic Records - Graduation - Graduand Details window

Requests - Graduation History - Graduand History

Requests - Graduation History - Graduand Award Ceremony History

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Identify and Create Graduands

- Manage Allocation of Graduands to Ceremonies

- Obtain Council Approval

- Assign Graduand Status

- Set Graduand Order in Presentation

- Graduation Ceremony Seating and Order of Presentation List

- Produce a Graduate Register

- Clean Up Graduand Records

Steps

1. Enter the graduation period and the ceremony round details in the Graduation Ceremony window and save your work.

2. Run the Identify and Create Graduands concurrent process to create graduand records for students who are eligible or potentially eligible.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: Graduand records are created for students whose programs allow graduation and whose program completion period is within the ceremony round effective dates. Graduand records for honorary awards must be created manually.

3. Click **Graduands** in the Graduation Ceremony window to view the graduands in the Ceremony Graduands window.

   Note: You can view the graduand history in the Graduand History window.

4. To manually assign graduands to a ceremony, click **Edit Graduand** in the Ceremony Graduands window and click **Ceremony**.

5. Save your work.

6. Optionally, run the Manage Allocation of Graduands to Ceremonies concurrent process to assign a batch of graduands to ceremonies.

Note: To allocate graduands to ceremonies, a graduand status must be Eligible or Potential, with a graduand type of Attending, Inabsentia, or Unknown, and an approval status of Approved or Waiting.

7. Click **Graduands** in the Ceremony Round Period region of the Graduation Ceremony window to view graduands for a ceremony round.

8. Click **Notes** to attach notes to the graduation ceremony in the Graduation Ceremony Notes window.

9. Click **Award Ceremony** to assign graduands to an award ceremony.

   Note: You can view the graduand award ceremony history in the Graduand Award Ceremony History window.

10. Click **Unit Set Group** to assign graduands to a unit set group in an award ceremony in the Unit Set Ceremony window.

11. Save your work.

12. Click **Set Approval (All)** to approve a batch of graduands for graduation in the Ceremony Graduands window.

    Note: The program completion requirements must be satisfied for approval.

13. Optionally, manually update the approval status of a graduand in the Graduand Details window.

14. Run the Obtain Council Approval concurrent process for a list of eligible graduands to be approved.

15. Click **Set Conferral Date (All)** in the Ceremony Graduands window to set the graduation conferral date.

16. Run the Assign Graduand Status concurrent process to update graduand status to Eligible or Potential.

    Note: Status is Eligible if graduand satisfied program completion requirements, if not, it is Potential.

17. Run the Set Graduand Order in Presentation concurrent process in the append or reallocate mode to set the award presentation order numbers for graduands.

    Note: The Reallocate mode assigns order numbers to all graduands with status Approved or Graduated, graduand approval status of Approved, and a graduand type of Attending. The Append Mode will assign order numbers only for graduands without one.

> **Note:** You can manually update the graduand order in the Ceremony Graduands window.

18. Run the Graduation Ceremony Seating and Order of Presentation List concurrent process for details on graduand seat allocations and order of presentation.

19. To change graduand ceremony details, click **Graduands** in the Graduation Ceremony window or directly go to the Graduand Ceremony Details window.

20. Run the Produce a Graduate Register concurrent process for graduand conferral details.

21. Run the Clean Up Graduand Records concurrent process to delete records of potential graduands who did not graduate or did not get approval to graduate in a ceremony round.

Guidelines

Graduands are of the following types:

- Attending when attending the ceremony

- Inabsentia when not attending the ceremony but receiving the award

- Articulate when declines award to pursue higher studies

- Deferred when wishes to receive award in a later ceremony round

- Declined when rejects the award for other reasons

A graduand can have the following statuses:

- Potential when identified as a possible graduand with program to be completed

- Eligible when completes the program

- Graduated when an award is conferred

- Surrender when a conferred award is surrendered in favor of a higher award

See Also

For general information on Academic Records, see Academic Records Overview.

Degree Audit

Degree audit, in Student System, is a functionality that enables institutions to evaluate student progress, and calculate GPA and number of credits required for

program completion. Institutions compare a student's current progress with their own program completion requirements. Institutions conduct degree audits for applicants and enrolled students. They evaluate student's existing credits and identify the units to be completed for program completion. When a student is transferred from one institution to another, institutions evaluate the transferred units and identify the institution equivalents. Transfer evaluations include unevaluated academic history units from Admissions. Transfer courses or units, stored in Academic History, are sent to the degree audit software. The degree audit software will return the evaluated courses (units) to Oracle Student System. The evaluated transfer courses are stored as Advanced Standing Units in Oracle Student System. Once the Degree Audit system has articulated the transfer course, it must pass to OSS the home institution unit details along with articulated credits for the unit taken.

A student, faculty, or staff can request for an audit or transfer evaluation through self-service. A third-party degree auditing software is used by institutions for this purpose. The required information is transferred to this software via interface tables and the third-party software processes the data.

Prerequisites

The report request process and the order of units to be processed must be configured.

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window - Degree Audit Purge Request Report

Steps

1. Run the Degree Audit Purge Request Report concurrent process to purge details of processed requests from the interface tables.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: Run in the preliminary mode to identify the requests and generate a report. Run in the finalized mode to delete the identified requests and generate a report.

See Also

For general information on Academic Records, see Academic Records Overview.

Order and Produce Documents

Institutions provide transcripts to students at the end of an academic year or on graduation. They produce transcripts and enrollment certifications when they receive orders from students through self-service. The administrator can also place the order on behalf of a student or a group of students.

When a hold exists on the transcript, institutions can choose to either disallow students from requesting for one or provide one when the hold is released. Institutions notify students in either case. The administrator can place a bulk order for transcripts for a batch of students through self-service. Transcript holds are not considered for a bulk order of transcripts.

Institutions can redefine document request processing options like transcript service plans, document purpose, delivery fee, document fee, and alias types as and when required.

When a student requests for a document and pays the fee, an item record is created in the interface tables. When the item is processed and sent, the document status is updated to processed in the interface table. A process is run to update the order and document status in Oracle Student System, following which students are notified.

Prerequisites

Document processing options and delivery method types must be defined.

Responsibility

Oracle Student System Super User

Navigation

Order Documents - Setup Processing Options - Document Request Processing Setup window

Requests - Concurrent Manager - Requests - Run (Single Request) - Submit Request window

- Produce Transcript

- Enrollment Certificate

- Update Order and Item Statuses

Steps

1. Change the document request processing options in the Document Request Processing Setup window if desired.

2. Run the Produce Transcript concurrent process to produce transcripts for students.

   For information on running a concurrent process, see Concurrent Process Procedure.

   Note: To produce transcript for a single student, specify Student Number or Student Number and Document. For a batch of students, specify Organization Unit, Career, or Item Numbers.

3. Run the Enrollment Certificate concurrent process to produce enrollment certificates for students.

   Note: To produce transcript for a single student, specify Student Number or Student Number and Document. For a batch of students, specify Organization Unit, Career, or Item Numbers.

4. Run the Update Order and Item Statuses concurrent process to update document order status.

Guidelines

Students request for missing academic records through self-service if their details are missing in the transcript. If there are missing academic records, the request for documents is not updated to complete and an exception is shown in the report. When the administrator receives a request for missing academic records, the request is processed, and the administrator manually updates the request status to complete.

See Also

For general information on Academic Records, see Academic Records Overview.

For information on class rank, see Academic Statistics.

A

Concurrent Process Procedure

To run a concurrent process, perform the following steps.

1. In Oracle Student System, navigate to the Submit a New Request window as follows:

   Requests - Concurrent Manager - Requests - Run

   The Submit a New Request window appears.

2. Select Single Request.

3. Click **OK**.

   The Submit Request window appears.

4. In the Name field, select the concurrent process from the list of values.

5. Click **OK**.

   The Parameters window appears.

6. Enter data in appropriate fields.

7. To apply the parameters, click **OK**.

8. To send the request to the concurrent manager, click **Submit**.

   The Requests window appears.

9. To view the log file, select the appropriate Request ID and click **View Log**.

10. If there are any errors, make corrections and run the concurrent process again.

11. Close the window.

Glossary

1040 form/1040a form/1040ez form

Federal income tax returns. Each person who received an income during the previous year must file a 1040 form with the IRS by April 15.

1090 form

Used by businesses to report income paid to a non-employee. Banks use this form to report interest income.

401(k)

Type of retirement fund. Money can be borrowed from a 401(k) to help pay for a child's education.

academic calendar

Twelve-month user-defined period representing a cycle of academic activities.

academic year

Period during which the school is in session, consisting of at least 30 weeks of instructional time. The school year typically runs from the beginning of September through the end of May at most colleges and universities.

accrual date

Date on which interest charges on an educational loan begin to accrue. See subsidized loan.

academic history

Record of prospect or applicant's secondary and post-secondary units and grades at a previous institution that is submitted to an institution.

academic index

Calculated for a student based on academic history, previous academic performance, and admission test scores.

academic interest

The subjects applicant is interested in and would like to major in.

account code

General ledger account code specific to a financial reporting period.

ACT

See *American College Testing Program*.

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 needs to be applied to related student unit attempts. Deleted after the change is automatically 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, for example, BILL TO.

admit/deny

A practice 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 application status

Describes the progress of an application within the admission process.

admission calendar

User-defined period, nine or twelve months representing a cycle of admission activities prior to the period in which the applicant would enroll.

admission category

Institution-defined categories used for sets of applicants whose applications are processed through a common set of admission steps.

admission code

Describes the matriculation category assigned to an applicant on the basis of current qualifications. These codes can be mapped to basis for admission types. See *basic details*.

admission conditional offer status

Indicates if the conditions attached to an offer of admission have been met.

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 credential types

User-defined designations for items that an applicant provides in support of an application for admission. Examples include transcripts, essays, or personal statements.

admission documentation status

Describes the status of the documentation required of an applicant by the institution.

admission entry qualification status

Indicates if applicant is qualified to apply for a program.

admission fee status

Describes the status of the applicant's payment of an admission fee.

alternative loans

See *private loans*.

admission offer deferment status

Describes the progress of the applicant's request for deferral of admission.

admission offer response status

Describes the status of the applicant's response to an offer of admission.

admission outcome status

Describes the progress of the applicant's request for admission to a program.

Advanced Placement test

Test used to earn credit for college 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. Examples include Program Admission, Program Transfer, Re-admission, Short Admission, and Admission to Non-Award Units of Study.

admission process step

A system-defined action set as a guideline for processing or required to complete the admission process.

admission test results

Scores attained on an applicant's standardized admission test.

admission test type

Standardized admission test scores that may be used when evaluating applications for admission.

admission type

See *basis for admission type*.

admission unit outcome status

Describes the progress of the applicant's request for admission to a unit.

advanced standing internal limit

Maximum amount of advanced standing that can be granted in a program for studies undertaken at the institution.

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.

advanced standing unit

Unit in which the student is granted advanced standing.

advanced standing unit level

Level at which advanced standing is granted.

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.

allow intermission

Indicates if intermission is allowed for the program version.

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.

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*.

appeal

Formal request for a financial aid administrator to review a student's aid eligibility and possible use of professional judgment to adjust the figures. For example, if a student believes the financial information on the financial aid application does not reflect the family's current ability to pay, for example, because of a parent's death, unemployment, or any unusual circumstances, an appeal must be considered. See professional judgement.

applicant

Prospective student who applies for a program.

applicant intent

The reason for applicant applying for the program; it could be a better career, better job prospects, or to enrich skills.

application

Submitted by an applicant for academic and admission calendars and admission process category (APC).

application completion status

Indicates if institution has received and verified documentary evidence required to be provided by applicant and finds it satisfactory, unsatisfactory, or incomplete.

application fee

Amount a student is to be charged for every application submitted.

application ID

Generated by the system and unique to an application.

application instance

Submitted by an applicant for a different program, location, attendance type, attendance mode in the same session academic and admission calendars, APC and application.

application processing status

Indicates progress of application processing whether completed, incomplete or withdrawn.

application review profile

Used to sort applications for evaluation first by level of study and then by other groupings such as applicant names, institution or applicant addresses, market codes, organizational units, or programs.

application source

Source from which an application is received such as paper, electronic, the web or flat files provided by the government or third-party agencies.

application type

Attached to an APC and defines different rates for application fees and enrollment deposits that students are to be charged.

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 that a student is 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

An item of value, such as a family's home, business, farm equity, real estate, stocks, bonds, mutual funds, cash, certificates of deposit (CDs), bank accounts, trust funds, and additional property and investments.

assistantship

See graduate assistantship.

associate degree

Degree granted by two-year colleges.

asset protection allowance

A portion of a student's parents' assets that are not included in the calculation of the parent contribution, as calculated 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 a candidate's 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-time or part-time, based on the study load. Each attendance type must be mapped to a government attendance type.

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's record, if authorization is required, or who authorized a unit set to be removed from a student's 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 code

Identifies an award, such as Bachelor of Arts or Graduate Diploma of Education, offered by an institution.

award program

Program that yields an award when completed successfully.

award letter

Official document issued by a school's financial aid office listing all financial aid awarded to the student. Provides details of the student's financial need and a breakdown of the financial aid package according to amount, source, and type of aid. Also includes terms and conditions of the financial aid and cost of attendance information. Students are required to sign a copy of the letter, accepting or declining each source of aid, and return it to the financial aid office. 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. An award year is a smaller unit than a processing year. See processing year.

bachelor's degree

Undergraduate degree granted by four-year colleges and universities.

balloon payment

A larger than usual payment used to repay the outstanding balance of a loan without penalty. Not all loans allow balloon payments. Simple interest loans such as educational loans, generally allow balloon payments.

bankruptcy

A bankrupt person is declared legally insolvent and all property is distributed among creditors or otherwise administered to satisfy the interests of creditors. Federal student loans, however, cannot typically be discharged through bankruptcy.

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 of study based on their current qualifications and experience. These types can be mapped to government basis for admission types.

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.

budget

See *cost of attendance*.

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.

bursars office

University office responsible for billing and collection of university charges. Also known as Student Accounts Office.

by-pass indicator

Determines if an item's tracking step is bypassed. If a tracking step is bypassed, action dates of subsequent steps are recalculated.

CWS

See *College Work Study*.

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 the system to determine the functionality of each

calendar type. The limited number of calendar categories are accessed from lists of values in the data entry windows. A date alias can be linked to a calendar category, restricting the date alias's use to calendars in that category.

calendar configuration

Procedure where system-defined date aliases are mapped to institution-defined date aliases. This mapping is used in the Admission and Enrollment and Research subsystems to enforce deadlines.

calendar instance

Institution-defined data that defines specific occurrences of a calendar type. A calendar instance is created by assigning a start and end date and a calendar status to a calendar type.

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's level of activity. Each calendar status must be assigned a system status, including ACTIVE, INACTIVE, or PLANNED.

calendar type

Institution-defined name given to all calendars of a similar classification. Each calendar type must be assigned a calendar category for the system to determine the functionality of each calendar type.

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.

capital gain

Increase in the value of an asset such as stocks, bonds, mutual funds, and real estate between the time the asset was purchased and sold.

career

Grouping of the program for a student (e.g., undergraduate, graduate, etc.)

cancellation

Some loan programs provide for cancellation of the loan in certain circumstances, such as death or permanent special need of the borrower. Some Federal student loan programs have additional cancellation provisions. For example, if students become teachers in certain national shortage areas, they can be eligible for cancellation of all or part of the balance of their educational loans. Repayment assistance is available if the borrower serves in the military; the military pays off a portion of the loans for every year of service.

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. See unsubsidized loan.

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, represented by a calendar; the preparatory events leading up to a ceremony and the clean-up processes after a ceremony.

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 a student's study load over a fee period.

charge method

Determines the number of charge elements used in a fee calculation, including FLATRATE, EFTSU, PERUNIT, and CRPOINT.

charge method apportion

Relationship between fee periods and load periods that determines a student's 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 a person's 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 standing

Student's rank in education. For example, freshman, sophomore, junior, and senior.

collateral

Property used to secure a loan. If the borrower defaults on the loan, the lender can seize the collateral. For example, a mortgage is usually secured by the house purchased with the loan.

collect mark indicator

Specifies if marks can be recorded when entering results.

collect mark indicator

Specifies if marks can be recorded when entering results.

collection agency

A company often hired by the lender or guarantee agency to recover defaulted loans.

college board

A nonprofit educational association of colleges, universities, educational systems, and any educational institutions.

college work-study

College work-study is a part-time job.

combined degrees

Programs leading to more than one award, such as a B.A/B.S degree leading to both Bachelor of Arts and Bachelor of Science awards.

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 a program's requirements. A ceremony round is associated with one or more completion periods. The graduand identification and creation process selects those student program attempts whose completion period matches one of those associated with the ceremony round.

completion/progression indicator

Indicates if advanced standing details count toward a student's 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.

compounded interest

Interest paid on the principal balance of a loan and on any accrued interest. Capitalizing the interest on an unsubsidized Stafford loan is a form of compounding. See *capitalization and Stafford loans*.

conditional offer

Offer of admission to a program, contingent on the applicant's fulfilling certain requirements such as presenting original documentation.

conferral date

Date an award is officially given, applied by the system to a group of graduands or manually to 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 a student's 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.

consolidation loan

Combines several student loans into one loan from a single lender. Used to repay balances on additional loans.

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 university's 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.

cost of attendance

Total cost of student attending school, including tuition and fees, room and board, allowances for books and supplies, travel, personal, and incidental expenses. Loan fees, if applicable, can also be included in the COA. Child care and expenses for disabilities can also be included at the discretion of the financial aid administrator. Schools establish different standard budget amounts for students living on-campus and off-campus, married and unmarried students, and in-state and out-of-state students. Also known as the cost of education or budget.

count in progression indicator

Indicates if the advanced standing details count toward a student's completion and progression requirements for the program.

country code

Institution-defined code describing a country that must be mapped to a government country code.

credit rating

An evaluation of the likelihood of a borrower to default on a loan. Credit bureaus and credit reporting agencies provide this information to banks and businesses to help them decide whether to issue a loan or extend credit. A credit rating can include a borrower's payment history, a list of current and past credit accounts with balances, employment and personal information, and a history of past credit problems.

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 upon 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.

currency code

Indicates the currency in which fee assessments and payments are made.

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

A borrower's failure to repay according to the terms agreed upon when the promissory note was signed. Default can also occur when a borrower fails to submit requests for deferment or cancellation and is generally referred to as a technical default. When a borrower defaults on a federal student loan, the school, organization holding the loan, guarantee agency, and Federal Government can all

take action to recover the money. A borrower is considered to be in default when payments are 180 or more days overdue and no satisfactory arrangements for deferment or forbearance are made. Assets, including Internal Revenue Service (IRS) refunds can be seized and the borrower's credit record or history is negatively affected. Student loan borrowers who are in default are ineligible for additional federal student aid, including grants and loans.

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*.

deferment

Occurs when a borrower is allowed to postpone repaying the loan. If the borrower has a subsidized loan, the Federal Government pays the interest charges during the deferment period. The borrower is responsible for the interest that accrues during the deferment period on an unsubsidized loan. The interest charges can be postponed by capitalizing the interest that increases the size of the loan. Most federal loan programs enable students to defer their loans while they are in school at least half time. If the borrower does not qualify for a deferment, a forbearance can be possible. A deferment is not possible if the loan is in default.

deferment status

See *admission offer deferment status*.

deferred payment option

See *government contribution payment option*.

delinquent

If the borrower fails to make a payment on time, the borrower is considered delinquent and late fees can be charged. If the borrower misses several payments, the loan goes into default.

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.

dependant

A child or an additional person who lives with the student, and the student provides the child with more than half of their support. Spouses do not count as dependants in the federal methodology. Two people, such as husband and wife, cannot both claim the same child as a dependant. See independent.

dependency status

Determines to what degree a student has access to parental financial resources.

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.

DETYA

Australian Federal Department of Education, Training and Youth Affairs.

differential contribution indicator

Identifies students liable for differential contributions.

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.

disability type

Institution-defined code describing a student's disability that must be mapped to a government disability type.

disbursement

Release of loan funds to the school for delivery to the borrower. Payment is co-payable to the student and school. Loan funds are first credited to the student's account for payment of tuition, fees, room and board, and additional school charges. Excess funds are paid to the student in cash or by check. The disbursement is made in at least two equal installments unless the loan amount is under $500.

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 a student's 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.

disclosure statement

Provides the borrower with information about the actual cost of the loan, including the interest rate, origination, insurance, loan fees, and any additional finance charges. Lenders are required to provide the borrower with a disclosure statement before issuing a loan.

discipline group

Field of academic learning into which a unit can be classified.

discontinuation reason code

Identifies the student's primary reason for the discontinuation of a student program attempt.

discontinued date

Date a student withdraws from a program or unit attempt.

discontinue enrollment indicator

Alerts staff that it is necessary to discontinue a student's 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.*

due diligence

If a borrower fails to make payments on the loan according to the terms of the promissory note, the Federal Government requires the lender, holder, or servicer of the loan to make frequent attempts to contact the borrower, through telephone and mail, to encourage repayment of the loan and to make arrangements to resolve the delinquency. See delinquent.

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. Ivy League schools do not enable applications to more than one Ivy League early action. See early decision.

Electronic Data Exchange

Program used by participating schools to electronically receive SARs from the federal processor. At some schools, 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 enabling gifted 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*.

EFC

See *Expected Family Contribution*.

Expected Family Contribution

Sum of money that the family is expected to be able to contribute to the student's education, as determined by the federal methodology need analysis formula approved by Congress. Includes the parent and student contributions and depends on the student's dependency status, family size, number of family members in school, taxable and nontaxable income, and assets. The difference between the cost of attendance and the expected family contribution is the student's financial need and is used in determining the student's eligibility for need-based financial aid. If a student has unusual financial circumstances such as high medical expenses, loss of employment, or death of a parent that can affect the ability to pay for an education, the financial aid administrator (FAA) can adjust the cost of attendance or expected family contribution to compensate. See professional judgement.

ETS

See *Educational Testing Service*.

Educational Testing Service

Company that produces and administers the SAT and additional educational achievement tests. See *Scholastic Assessment Test*.

effect type

See *system hold effect type*.

effective date

If specified as a parameter in a process, allows the process to access the database on a date other than the current date.

effective date - currency

Date when a currency's rate of exchange applies.

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.

EFT

See *Electronic Funds Transfer*.

electronic outcome upload file

Comma-delimited text file of student unit attempt outcomes uploaded into the system.

Electronic Funds Transfer

Used by some schools and lenders to wire funds for Stafford and PLUS loans directly to participating schools without requiring an intermediate check for the student to endorse. Money is transferred electronically instead of using paper and is available to the student sooner.

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.

eligible noncitizen

Person who is not a U.S. citizen but is eligible for federal student aid. Eligible noncitizens include U.S. permanent residents who are holders of valid green cards, U.S. nationals, holders of form I-94 who have been granted refugee or asylum status, and certain noncitizens. Noncitizens who hold a student visa or an exchange visitor visa are not eligible for federal student aid.

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.

emancipated

To release a child from the control of a parent or guardian. Declaring a child to be legally emancipated is not sufficient to release the parents or legal guardians from the responsibility of providing for the child's education. See dependency status.

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 at an institution.

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

The way in which 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 fulltime or part-time. Generally, a student must be enrolled at least half-time, and in some cases fulltime, 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 such as the Pell Grant program.

entry point indicator

Indicates if a program offering option can be an entry point through Admissions.

entry qualification

See *admission entry qualification status*.

entrance interview

See loan interviews.

ELO

See *Expanded Lending Option*.

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.

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 session venue supervisor

See *examination supervisor.*

examination supervisor

Person who supervises an examination.

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 the level of responsibility of a supervisor, and the role the supervisor plays.

examination venue indicator

Indicates if a supervisor is assigned to a particular venue during an exam session.

exit interview

See loan interviews.

exit program code

Alternative exit program code.

exit version set

Valid version numbers of an alternative exit program, used by the Progression subsystem.

expanded lending option

Program enabling some schools to offer higher annual and cumulative loan limits to students receiving the Perkins loan. ELO is restricted to schools with a Perkins loan default rate of 15% or less. See Perkins loan.

expected submission date

See *submission date - expected*.

expiry date increment

Period of time, in months, added to the current date which is the default expiry 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 an institution's grading schema grade used when grades are published externally, such as in newspapers.

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 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. Loans are guaranteed against default by the Federal Government.

Federal Direct Student Loan Program

Similar to the Federal Family Education Loan Program (FFELP). Funds for these loans are provided by the U.S. Government directly to students and their parents through their schools. Includes the subsidized and unsubsidized Federal Direct Stafford Loan and the Federal Direct Parent Loan for Undergraduate Students (PLUS). See *federal family education loan program* and *parent loan for undergraduate students*.

federal work study

Program providing undergraduate and graduate students with part-time employment during the school year. The Federal Government pays a portion of the student's salary, making it cheaper for departments and businesses to hire the student. Eligibility for FWS is based on need. Money earned from FWS is not counted as income for the subsequent year's need analysis process.

fee assessment

Process of assessing a student's fee liabilities.

fee assessment effective date

See *effective date.*

fee assessment period

See *fee period*.

fee assessment rate

Charge rate applied 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 adjustment to fees, and that 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 status of activity of a fee encumbrance recorded against a student, and maps to a system status.

fellowship

Aid given to graduates to help support their education. Some fellowships include a tuition waiver or a payment to the university in lieu of tuition. Most fellowships include a stipend to cover reasonable living expenses. 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. The net value of the family residence is not included.

fee period

When a particular fee, fee category, and associated data apply.

fee sponsorship status

Describes the status of activity 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 pProgram*.

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

Money provided to the student and family to help pay for the student's education. Includes gift aid such as grants, scholarships and self-help aid including loans and employment.

financial aid administrator

College or university employee involved in the administration of financial aid. Also known as financial aid advisors or counselors.

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 (FAN)

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 from all sources offered to a student to enable attendance at the college or university. Note that 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 school attended. If a student previously attended an institution of higher education and is now applying for financial aid from a different university, the university requires a FAT from each of the schools previously attended, regardless of whether aid was received. This is required by federal law. A student must submit a FAT even if in high school at the time. The FAT is not the same as an academic transcript.

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

Institution's financial year.

first-time borrower

A first-year undergraduate student who has no unpaid loan balances outstanding on the date a promissory note is signed for an educational loan. The first loan payment is disbursed 30 days after the first day of the enrollment period. If the student withdraws during the first 30 days of classes, the loan is canceled.

fixed disbursement

See *disbursement fixed*.

forbearance

Lender allows the borrower to temporarily postpone repaying the principal, but the interest charges continue to accrue, even on subsidized loans. The borrower continues paying the interest charges during the forbearance period. Forbearances are granted at the lender's discretion, usually in cases of extreme financial hardship or unusual circumstances when the borrower does not qualify for a deferment. The borrower cannot receive a forbearance if the loan is in default.

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 limitations placed on the processing routine to process an incomplete package.

formula number

Supplied automatically by the system to identify each disbursement formula in a set. See also *fee disbursement formula*.

Free Application for Federal Sudent Aid

Form used to apply for Pell Grants and all additional need-based aid. No fee is charged to file a FAFSA.

funding source

Institution-defined source of funds applicable to student program attempts.

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.

garnishment

Withholding a portion of a defaulted borrower's wages to repay an outstanding loan without consent.

gift aid

Financial aid, such as grants and scholarships, that is not repaid.

government Aboriginal or Torres Strait Islander code

Indicates if a student identifies as an Australian Aboriginal or Torres Strait Islander.

government admission center

External body that processes applications for admission to government institutions.

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 his or her 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's 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 a student's 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 at a student's permanent residence.

government level of completion

Code recognized by the relevant government admission center, to which an institution-defined code, identifying an applicant's progress toward completion of his or her government education studies, can be mapped.

government level of qualification

Code recognized by the relevant government admission center, to which an institution-defined code, identifying an applicant's current government education qualifications, 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. For example, 3.0 is represented as 30.

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.

grace days

Number of days added to a payment's due date to defer payments.

grace period

Period after graduation when the borrower is not required to repay student loans. The grace period can be used if the borrower leaves school for a reason other than graduation or falls below half-time enrollment. Depending on the type of loan, the

borrower has a grace period of six months for Stafford loans or nine months for Perkins loans before making repayments. PLUS loans do not have a grace period.

grade

Indicates student's level of achievement in a unit attempt; assessment outcome; assessment result; code representing a student's level of achievement that must be mapped to a system result type.

grade conversion

A feature in the Admissions subsystem that converts an applicant's grade or grade point average from one institution to the grading scale in use at the admitting institution.

graduate assistantship

Two types of graduate assistantships are available, teaching assistantships and research assistantships. TAs and RAs receive a full or partial tuition waiver and a small living stipend. TAs are required to perform teaching duties. RAs are required to perform research duties, not necessarily related to the student's thesis research. See *teaching assistantship* and *research assistantship*.

grade exists

Electronic results upload configuration setting that defines 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

Electronic results upload configuration setting that defines 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 the grades a student receives, taking into account the total study load.

grant

Type of financial aid based on financial need that is not repaid.

grade point average value

Numerical value assigned to a grade to calculate a student's grade point average.

graduated repayment

Repayment schedule if the monthly payments gradually increase over the repayment period.

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 for an institution.

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 and a graduand's progress toward graduating in a particular ceremony round. Associated with a system graduand approval status, including WAITING, APPROVED, and REJECTED.

graduand status

Indicates the current status of a graduand and a graduand's progress toward graduating in a particular ceremony round. Associated with a system graduand status, including POTENTIAL, ELIGIBLE, GRADUATED, and SURRENDER.

graduand type

System-defined values assigned to graduands to define their graduation intentions, including ATTENDING, attending graduation ceremony to receive award; INABSENTIA, not attending ceremony to receive award; ARTICULATE, declining award to pursue a higher program award; DEFERRED, receiving award in a later ceremony round; UNKNOWN; and DECLINED, declining award for other reasons.

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 to record extra information required by an institution. For example, note type GRAD-GUEST is assigned to a ceremony note listing guests attending the ceremony.

granting status

Describes the progress of a student's application for advanced standing.

gross income

Income before taxes, deductions, and allowances are subtracted.

group code

Code identifying a Person Number Group defined by the creator of a Person Number Group.

group ID

System-generated sequence number identifying a person number group.

group membership

See *tracking item group membership*.

guaranteed - entry assessment score

Score that guarantees an applicant an offer of admission to a program offering pattern, if it is achieved.

guarantee agency/guarantor

State agencies responsible for approving student loans and insuring them against default. Guarantee agencies also oversee the student loan process and enforce federal and state rules regarding student loans.

guarantee fee

Small percentage of loan paid to the guarantor to insure the loan against default. Fee is usually 1% of the loan amount and by law cannot exceed 3% of the loan amount.

guaranteed student loan

Loan insured against default. Federal Government agrees to repay the loans in case of default. Each loan is charged a guarantee fee to cover the costs of defaulted loans. This loan is also known as the Stafford loan.

half-time

Financial aid programs usually require that the student is enrolled at least half-time to be eligible for aid. Some programs require the student to be enrolled fulltime.

health education assistance loan

Low interest loan administered by the U.S. Department of Health and Human Services. Available to medical school students pursuing medicine, osteopathy, dentistry, veterinary medicine, optometry, podiatry, clinical psychology, health administration, and public health. Undergraduate pharmacology students are also eligible.

HECS

An Australian-specific contribution scale used in the fee calculation formula.

HSS

See *U.S. Department of Health and Human Services*.

health professions student loan

Low interest loan administered by the U.S. Department of Health and Human Services (HHS). See *primary care loan*.

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

See *fee hold*.

holder

Lender, institution, or agency holding legal title to a loan such as the bank that issued the loan, a secondary market that purchased the loan from the bank, or a guarantee agency if the borrower defaulted on the loan.

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.

HPSL

See primary care loan.

ignore warnings indicator - exam supervisor allocation

Suppresses warning messages when the system enters default exam supervisors.

IM

See *institutional methodology*.

income contingent repayment

Under an income contingent repayment schedule, the size of the monthly payments depends on the income earned by the borrower. As the borrower's income increases, so do the payments. The income contingent repayment plan is not available for PLUS loans.

in-state student

Student who meets the legal residency requirements for the state and is eligible for reduced in-state student tuition at public colleges and universities.

internship

Part-time job during the academic year or summer months a student receives supervised practical training in their field. Internships are often closely related to the student's academic and career goals, and can serve as a precursor to professional employment. Some internships provide very close supervision by a mentor in an apprenticeship-like relationship.

interest

Fee charged by the lender for borrowing money, usually calculated as a percentage of the principal balance of the loan. Percentage rate can be fixed for the life of the loan, or it can be variable, depending on loan terms. All federal loans issued after October 1992 uses variable interest rates that are pegged to the cost of U.S. Treasury Bills.

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, used to ensure timely mailings.

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.

independent

An independent student is one or more of the following: at least 24 years old as of January 1 of the academic year; married; a graduate or professional student; has a legal dependant other than a spouse; a veteran of the U.S. Armed Forces; an orphan or ward of the court or was a ward of the court until aged 18. A parent refusing to provide support for their child's education is not sufficient for the child to be declared independent. See also dependant.

industry links

Records any industries associated with a thesis or research candidacy.

IRA

See individual retirement account.

individual retirement account

Type of retirement fund. It is illegal to borrow money from an IRA to help pay for a child's education.

inquiry

A request from a prospective applicant for information about a program of studies.

inquiry application number

Sequence number identifying a person's inquiry.

inquiry characteristic type

Institution-defined classification of types of prospects, such as post graduate.

inquiry date

Date an inquiry is made.

inquiry information type

Institution-defined classification of inquiries likely to be made, such as travel, accommodation, and fees.

inquiry package item

Collateral items sent to prospective applicants. These can be grouped by inquiry information type, by program, or by inquiry level.

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.

insurance fee

Fee passed on by lender to the Federal Government as insurance against default. Insurance fees are charged as the loan is disbursed and typically run to 1% of the amount disbursed. See guarantee fee.

Institutional Student Information Report

Electronic version of SARs delivered to schools by ED express.

institution address

One or more addresses can be recorded for an institution, if they are different address types, for example, campus address and correspondence address.

institution - basis details

Institution where a student undertook the studies 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.

institutional methodology

Formula referred to if a college or university uses its own formula to determine financial need for allocation of the school's own financial aid funds

institution status

Indicates the level of activity of an institution. Institutional statuses are institution-defined and map to the system institution status, including ACTIVE and INACTIVE.

installment loan

Consumer loan if the principal and interest are repaid on a regular, usually monthly, schedule. Payments are called installments and are of equal amounts.

internal revenue service

Federal agency responsible for enforcing U.S. tax laws and collecting taxes.

intake target type

Types of applicants or students an institution has established targets for when offering programs, such as commencing students, regional entry students, and returning students.

internal limit - advanced standing

Maximum amount of advanced standing that can be granted in a program for studies undertaken at an institution.

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 of marks 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

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 a student's permanent residence that must be mapped to a government language code.

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 Enquiries batch job.

lender

Bank, credit union, savings and loan association, or additional financial institution that provides funds to the student or parent for an educational loan. Some schools now participate in the Federal Direct Loan program and no longer use a private lender, since loan funds are provided by the U.S. Government.

length or duration - assessment item

Length or duration of a non-examinable assessment item, for examples, an essay of 2000 words and a 90-minute seminar.

leveraging

If a school offers a talented student extra financial aid, regardless of need, the student is more likely to enroll. Leveraging is the controversial practice of calculating how to attract such students and customizing aid offers to optimize the quality of the incoming class.

level

Level at which data in the Student Finance subsystem is recorded determines the scope of its applicability.

level - hold

Level within the hierarchy of effect types.

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.

loan forgiveness

Federal Government cancels all or part of an educational loan because the borrower meets certain criteria, such as performing military or volunteer service.

line of credit

A bank, credit union, savings and loan association, or additional financial institution that provides funds to the student or parent for an educational loan. Some schools now participate in the Federal Direct Loan program and no longer use a private lender, since loan funds are provided by the U.S. Government.

loan interviews

Students with educational loans are required to meet with a financial aid administrator before receiving the first loan disbursement and again before graduating or leaving school. During these counseling sessions, called entrance and exit interviews, the financial aid administrator reviews the repayment terms of the loan and the repayment schedule with the student.

loan consolidation

See *consolidation loan*.

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 of a location owned or used by an institution.

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.

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 a student's 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.*

maturity date

Date when a loan becomes due and must be repaid in full.

MDE

See multiple data entry processor.

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 the majority of an advanced standing exemption was obtained.

major field of study

Describes which of the specified fields of study is the major one.

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 a student's 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

Electronic results upload configuration setting that defines 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 a student can achieve 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

Latest date a thesis can be submitted, required for a research candidacy. This system-derived date can be overridden.

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 the student's academic, artistic, or athletic merit, for example, and does not depend on the existence of financial need. Uses the student's 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.

milestone status

Institution-defined status showing the progress of a milestone, and mapped to a system-defined milestone status, including PLANNED, ACHIEVED, FAILED, and RE-PLANNED.

milestone type

Institution-defined classification of milestones, for examples, Six Month Report, Literature Review Report, Project Selection, Conference Presentation, Draft Thesis Available, and Miscellaneous.

minimum - entry assessment score

Minimum score required by an applicant to be considered for an offer of 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

Earliest date a thesis can be submitted, required for a research candidacy. This system-derived date can be overridden.

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*.

multiple data entry processor

Company that processes FAFSA forms submitted by students. The College Scholarship Service (CSS) and PHEAA are both MDE processors.

NHCS

See national health corps scholarship.

NMSQT

See preliminary scholastic assessment test.

NSL

See nursing student loan.

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.

national merit scholarship qualifying test

See *preliminary scholastic assessment test*.

negative adjustment

Any activity that partially reduces the balance of a student's account based on fee calculation.

national health corps scholarship

Scholarship program administered by the U.S. Department of Health and Human Services (HHS). Available to medical students studying allopathic and osteopathic medicine and to dentistry students.

need

The difference between the cost of attendance and the expected family contribution is the student's financial need; the gap between the cost of attending school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is known as need analysis.

The following formula shows how need is calculated:

Cost of Attendance - Expected Family Contribution = Financial Need

See cost of attendance and expected family contribution.

need analysis

Determines a student's financial need by analyzing financial information provided by the student, the student's parents, and spouse, if applicable, on a financial aid form. The student must submit a need analysis form to apply for need-based aid. Need analysis forms include the Free Application for Federal Student Aid (FAFSA) and the Financial Aid Profile.

national service trust

National community service program. If a student participates in this program before attending school, the funds can be used to pay educational expenses. If the student participates after graduating, the funds can be used to repay federal student loans. Eligible types of community service include education, human services, the environment, and public safety.

national student clearinghouse

A non-profit organization that aids in the student loan program for schools in the United States.

need-based

Financial aid that depends on a student's financial situation. Most government sources of financial aid are need-based.

need-blind

An offer of admission made to a student without considering the student's financial situation. Most schools use a need-blind admissions process. Some schools use financial need to decide whether to include marginal students in the wait list.

new student

Student enrolled in a program for the first time before the commence cutoff date alias, usually set to the census date, has been reached.

new borrower

See first-time borrower.

need-sensitive

The student's financial situation is taken into account when deciding whether to admit the student. Some schools use need-sensitive admissions when deciding to accept a borderline student or to take the student from the waiting list.

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, paper, 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 type

Institution-defined classification of notes related to a program. For example, a HANDBOOK note type can refer to notes containing information for publication in an institution's 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.

nursing student loan

Low interest loan administered by the U.S. Department of Health and Human Services (HHS) and available to students enrolled in nursing programs.

obsolete person number

Person number of the obsolete record in the Merge Person Number process.

offer date response offset

Number of days added to an applicant's 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 ceremony.

order in ceremony

Order in presentation of an award in a ceremony.

order in presentation

Graduand's position in the order of presentation of a ceremony.

order of precedence

Evaluates the fee assessment rate that should apply when a student's method of studying a program 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.

origination fee

Fee paid to the bank as compensation for the cost of administering the loan. Origination fees are charged as the loan is disbursed and typically run to 3% of the amount disbursed. A portion of this fee is paid to Federal Government to offset the administrative costs of the loan.

outcome

Grade or mark for a student unit attempt assessment item. Also known as result.

outside resource

Aid or benefits available because a student is in school and calculated after need is determined, such as outside scholarships, prepaid tuition plans, and VA educational benefits.

outside scholarship

Scholarship originating from sources other than the school and federal or state government.

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, typically for an assignment.

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's location is an owning location of its campuses' locations. A location can have multiple owning locations. See also *parent and child relationship*.

packaging

Process of assembling a financial aid package.

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 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.

paper name

Name of an examination paper.

parent and child relationship

A system record can be linked to other records in a one-to-one or one-to-many relationship. The records can be linked in a superior, or parent, or subordinate, or

child, relationship to represent real-life structures. For example, a faculty consisting of several schools is represented as children schools of a parent faculty.

parent contribution

An estimate of the portion of a student's educational expenses that the Federal Government believes the student's parents can afford. Based on the parents' income, number of parents earning income, assets, family size, number of family members currently attending a university, and additional factors. Students who qualify as independent are not expected to receive a parent contribution.

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.

Parent Loan for Undergraduate Students

Federal loans available to parents of dependant undergraduate students to help finance the child's education. Parents can borrow up to the full cost of their children's education, less the amount of any additional financial aid received. PLUS loans can be used to pay the expected family contribution.

payment advice number

Identifies a student or sponsor's fee payment received through a bank.

payment due date

Date when payment of a fee liability, or partial payment, is due.

payment rank

Determines the order in which payment amounts received should be applied to a student's fee liabilities.

payment schedule

Template schedule from which payment due dates for a fee are derived.

PCL

See *primary care loan*.

Pell grant

Federal grant based on the student's financial need.

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.

Perkins loan

Low interest rate loan awarded by the financial aid administrator to students with exceptional financial need. The student must apply for a Pell Grant to be eligible. Interest on the Perkins loan is subsidized while the student is in school. Formerly known as the National Direct Student Loan Program.

permanent resident code

Institution-defined code indicating a student's 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.

perusal time

Amount of time for reading an exam paper prior to an examination.

PLAN

Test taken in the fall of the sophomore year in high school as practice for the ACT.

PLUS

See *parent loan for undergraduate students*.

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.

pre-enroll units indicator

Specifies that student unit attempts for a program offering pattern should be pre-enrolled as part of pre-enrollment.

Preliminary Scholastic Assessment Test

Test taken during the junior year as practice for the scholastic assessment test. Scores on the PSAT are used to select semifinalists for the National Merit Scholarship program.

prepaid tuition plan

College savings plan guaranteed to rise in value at the same rate as college tuition fees. For example, if a family purchases shares that are worth half a year's tuition at a state college, they are always worth half a year's tuition, even if tuition rates have doubled 10 years later.

primary assessor

See Primary Assessor Indicator.

primary assessor indicator

Specifies that an assessor is the senior, or principal, assessor for an assessment item.

primary care loan

Low interest loan administered by the U.S. Department of Health and Human Services (HHS). Available to medical school students studying medicine, osteopathy, dentistry, veterinary medicine, optometry, and podiatry. Undergraduate pharmacology students are also eligible. To be eligible for this loan, a student must commit to working in the field of primary care. Previously known as the Health Professions Student Loan (HPSL).

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.

principal

Sum of money borrowed or remaining unpaid on a loan. Interest is charged as a percentage of the principal. Insurance and origination fees are deducted from this amount before disbursement.

prior education

Statistical details related to a student's prior educational experience.

priority code - venue

Indicates an order of preference when allocating examinations to venues, with no associated system functionality.

private loans

Education loan programs established by private lenders to supplement the student and parent education loan programs available from federal and state governments.

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.

professional degree

Degree awarded in a field such as law, education, medicine, pharmacy, or dentistry.

professional judgement

For need-based federal aid programs, the financial aid administrator can adjust the expected family contribution, adjust the cost of attendance, or change the dependency status when extenuating circumstances exist. For example, if a parent dies or if a parent becomes unemployed or disabled, the financial aid administrator can use estimated income information for the award year instead of the actual income figures from the base year. Delegation of authority from the Federal Government to the financial aid administrator is known as professional judgement.

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 a student's 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.

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 status of activity, 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 a student's admission and enrollment in a program is pending permanent arrangements. The indicator must be selected manually.

promissory note

Binding legal document signed by the student borrower before loan funds are disbursed by the lender. States terms and conditions of the loan, including repayment schedule, interest rate, deferment policy, and cancellations.

PSAT

See preliminary scholastic assessment test.

publish outcomes indicator

Indicates if a student should have assessment results published. The default is yes.

qualification recency - advanced standing

Number of years during which other studies are recognized for granting advanced standing in a program.

quantity per student - supplied exam materials

Indicates the quantity of an exam material type to supply to each student for an examination.

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 type of scale of values used to rate admission applications.

RA

See *research assistantship*.

reaching school

A student's preferred school, but the school is not obliged to admit the student. See safety school.

renewable scholarship

Scholarship awarded for more than one year. Usually, the student must maintain certain academic standards to be eligible for subsequent years of the award. Some renewable scholarships require the student to reapply for the scholarship each year; others require a report on the student's progress.

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 an assessor's comments regarding the assessment or thesis result he or she recommends.

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.

repayment schedule

Provides details of the monthly payment, interest rate, total repayment obligation, payment due dates, and term of the loan.

repayment term

Period during which the borrower is required to make payments on outstanding loans. Usually indicated as a number of payments or years when the payments are made monthly.

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 to help support their education. Research assistantships usually provide the graduate student with a waiver of all or part of tuition, plus a small stipend for living expenses. 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

Institution-defined status applied to an 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

Broad subject to be researched by a research student, and a required field in a research candidacy record. More detailed information is recorded with the thesis details.

reserved enrollment

Subset of the enrollment quota that is currently reserved.

resolved indicator - non-enrolled outcomes

Specifies that an 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. See also *system result type*.

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 a student's 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 student

Student enrolled in a program for the first time after the commence cutoff date alias has been reached.

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 version of a unit 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 successfully by the system, selecting No causes the student to be checked manually.

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.

SAT

See *scholastic assessment test*.

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.

safety school

A school that most certainly admits the student. See reaching school.

satisfactory academic progress

A student is required to continue making progress to receive federal aid. If a student fails to maintain an academic standing consistent with the school's SAP policy, the school's graduation requirements are unlikely to be met.

scheduled indicator - assessment item

Indicates if an examinable assessment item is included in an examination timetable.

Sallie Mae

Largest secondary market holding approximately one third of all educational loans. Formerly known as the Student Loan Marketing Association (SLMA).

schedules

See E*ncumbrance schedule, 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

Type of financial aid given to undergraduate students to help pay for their education. Most scholarships are restricted to paying all or part of tuition expenses. Scholarships are a form of gift aid and are not repaid. Many scholarships are restricted to students in specific programs of study or with academic, athletic, or artistic talent.

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 search service

Service that charges a fee to compare the student's profile against a database of scholarship programs.

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.

secondary market

Organization buying loans from lenders, providing the lender with capital to issue new loans. Selling loans is a common practice among lenders, and the bank a student makes payments to can change during the life of the loan. The terms and conditions of a loan do not change when it is sold to another holder. Sallie Mae is the nation's largest secondary market and holds approximately one third of all educational loans.

second percentage

Used when a teaching calendar is related a second time to a load calendar instance.

selection criteria - thesis panel type

Describes selection criteria for members of an examination panel, including required qualifications and years of experience.

selective service

Registration for the military draft. Male students who are U.S. citizens and have reached the age of 18 and were born after December 31, 1959 must be registered with Selective Service to be eligible for federal financial aid. If the student did not register and is older than 25, and the school determines that the failure to register was knowing and willful, the student is ineligible for all federal student financial aid programs. The school's decision as to whether the failure to register was willful is not subject to appeal.

self-help aid

Financial aid in the form of loans and student employment. If a financial aid package is required to include a minimum amount of self-help aid before any gift aid is granted, that level is known as the self-help level.

self help group indicator

Specifies that a student wants to participate in a self-help group for an enrolled program attempt.

Service Academy

U.S. Air Force Academy, U.S. Coast Guard Academy, U.S. Merchant Marine Academy, U.S. Military Academy, and U.S. Naval Academy. Admission is highly

selective as students must be nominated by their Congressional Representative in order to apply.

servicer

Organization collecting loan payments and performing additional administrative tasks associated with maintaining a loan portfolio. Loan servicers disburse loans funds, monitor loans while the borrowers are in school, collect payments, process deferments and forbearances, respond to borrower inquiries, ensure that the loans are administered in compliance with federal regulations, and guarantee agency requirements.

sequential indicator

Determines if an item's tracking steps must be completed in sequence and if calculated action dates for steps are progressive.

session

Each use of Oracle Student System, from logging on to logging off.

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 supervised at the home institution used to indicate a supervisor's level of experience.

sessions at other institutions - exam supervisors

Number of examination sessions a supervisor has supervised at other institutions, used to indicate a supervisor's level of experience.

secured loan

Loan backed by collateral. If a student fails to repay the loan, the lender can seize the collateral and sell it to repay the loan. Auto loans and home mortgages are examples of secured loans. Educational loans are generally not secured.

simple interest

Interest paid only on the principal balance of the loan and not on any accrued interest. Most federal student loan programs offer simple interest. Capitalizing interest on an unsubsidized Stafford loan is a form of compounded interest.

simplified needs test

The federal methodology ignores assets when calculating the expected family contribution. If parents have an adjusted gross income of less than $50,000 and if every family member is eligible to file an IRS Form 1040A or 1040EZ or does not need to file a federal income tax return and if a student filed a 1040 but was not required to do so, then that student can be eligible for the simplified needs test.

SLMA

See *sallie mae*.

short paper name

See *paper name*.

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 indicator - special consideration

Specifies that a special consideration outcome is included in the list of available sought outcomes.

sought outcome - special consideration

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.

special award

Award other than a program or honorary award, including prizes and medals. Special awards can be announced at graduation ceremonies.

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.

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*.

Stafford loans

Subsidized and unsubsidized federal loans. Subsidized loans are based on need; unsubsidized loans are not. Interest on subsidized Stafford loans is paid by the Federal Government while the student is in school and during the six month grace period. Subsidized Stafford loans were previously called Guaranteed Student Loans

(GSL). Unsubsidized Stafford loans can be used to pay the expected family contribution.

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.

student loan marketing association

See sallie mae.

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) and must be provided to a school's financial aid office. The SAR 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 a student's 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, including PENDING, SUBMITTED, EXAMINED, and DELETED.

step

See *admission step, enrollment step, tracking step, tracking type step*.

step complete indicator

Set by a step's recipient or a tracking item's originator 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 accounts office

See bursars office.

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

Describes the relationship between a group of students and an institution at enrollment, and used to define enrollment procedure details and steps for each group of students. Student groups are NEW, commencing a program; RETURN,

continuing in an enrolled program attempt; or ALL, both new and returning students.

student program attempt

Enrollment of a student in a particular program offering option.

student target

Numeric range for goal of admission of applicants with certain characteristics to programs of study. Targets can be defined for organization units, by funding source, by program offering pattern, by unit set, by program type, program attendance mode, and by unit internal program level.

student unit attempt

Enrollment of a student in a particular unit offering pattern.

student unit attempt assessment item

See *assessment item*.

supplemental loan for students

Federal loans for financially independent students. This program was discontinued in 1994 with the introduction of unsubsidized Stafford loans program.

subsidized loan

The government pays interest on the loan, such as the Perkins loan or the subsidized Stafford loan, while the student is in school, during the six-month grace period and during any deferment periods. Subsidized loans are awarded based on financial need and might not be used to finance the family contribution. See *Stafford loans* and *unsubsidized loan*.

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.

successful applicant

Applicant eligible to receive an offer.

superior calendars

See *calendar instance relationship*.

superior unit

Unit with subunits.

superior unit version

Unit version with subunit versions.

supervision - end date

Date when a supervisor's 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 a supervisor works for when serving as supervisor.

supervision percentage

Percentage of supervision undertaken by a supervisor, used to calculate the research load incurred by supervisors within an institution.

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 becomes effective for 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.

supplemental education opportunity grants

Federal grant program for undergraduate students with exceptional need. SEOG grants are awarded by the school's financial aid office. To qualify, a student must also be a recipient of a Pell Grant.

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 of the processes available for direct admission, 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 defines an institution's level of activity and to which an institution-defined institution status is mapped, including 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 defines an organizational unit's level of activity and enables functionality, and to which an institution-defined organizational unit status is mapped, including 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.

TA

See *teaching assistantship*.

target

Minimum target to be reached.

teaching assistantship

Financial aid awarded to graduate students to help support their education. Teaching assistantships usually provide the graduate student with a waiver of all or part of tuition, plus a small stipend for living expenses. A TA 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. See term.

tax file number invalid date

Date an institution is notified that a student supplies an invalid tax file number.

Test of English as a Foreign Language

Most colleges and universities require international students to take the TOEFL as part of the admission application. TOEFL evaluates a student's ability to communicate in and understand English.

tax file number recorded date

Date when a student's 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.

testamur type

Classification of testamurs based on their content and layout. Each testamur type must be mapped to a correspondence type to record the mailing of testamurs.

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, for example, written, performance, 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

Assessment outcome or grade of a thesis.

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.

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.

TOEFL

See *test of english as a foreign language*.

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 a tracking group's 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 group membership

Membership of a tracking item in a tracking group or groups.

tracking item ID

System-generated identification number of a tracking item.

tracking item originator

Name and identification number for a person who created a tracking item.

tracking item subject

Name and identification number for a person who is the subject of a tracking item, typically, a student.

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 to process a tracking item, identified by a system-generated number representing the order the step is completed 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.

trigger

Program, group of programs, unit, unit set, or trigger group recorded for a fee liability matched against a student's program, unit attempts, or unit set to determine if the student is liable for a particular fee. See also *program fee trigger, program group fee trigger, program type fee trigger, unit trigger, unit set trigger,* and *trigger group*.

trigger group

Group consisting of program, unit, and unit set triggers and acting as a single trigger.

unconditional offer

Standard offer of admission to a program, including details of any advanced standing offered.

unearned income

Interest income, dividend income, and capital gains.

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

Class in which a unit is taught.

unit code

Identifies a unit.

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's 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-campus 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 to students specified 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 an applicant's 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 set

Group of units or rules with a common characteristic or characteristics, including MAJOR, MINOR, STRAND, and STREAM.

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 the level of activity of a unit, for example, CURRENT and SUSPENDED.

unmet need

Due to budget constraints, the financial aid officer can provide the student with less than the student's need. This gap is known as the unmet need. See need.

unsubsidized loan

Interest is not paid by the government on unsubsidized loans. The borrower is responsible for interest on an unsubsidized loan from the date the loan is disbursed, even while the student is in school. Students can avoid paying interest while they are in school by capitalizing the interest that increases the loan amount. Unsubsidized loans are not based on financial need and can be used to finance the family contribution. See *Stafford loans* and *subsidized loan*.

unit trigger

Unit code indicating that students in that unit are to be assessed a fee.

untaxed income

Contributions to IRAs, Keoghs, tax-sheltered annuities, and 401k plans, as well as worker's compensation and welfare benefits.

unit version reference

Identifies the unit version to which a correspondence item is related.

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.

unsuccessful applicant

Applicant who has met the requirements for admission but is not offered admission because of quota restrictions or other reasons.

untaxed income

Contributions to IRAs, Keoghs, tax-sheltered annuities, and 401k plans, as well as worker's compensation and welfare benefits.

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's attendance type in an academic period.

upper range

See *element range*.

U.S. Department of Education

Government agency administering several federal student financial aid programs, including federal Pell Grants, Federal Work-Study Programs, Federal Perkins loans, Federal Stafford loans, and Federal PLUS loans.

U.S. Department of Health and Human Services

Government agency administering several health education loan programs, including the Health Education Assistance Loan, Health Profession Student Loan, and Nursing Student Loan programs.

USED

See *U.S. Department of Education*.

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 alias

Applies to assessment items. Used to warn against further variations in the unit assessment item in a teaching period.

variable interest

Interest rate that changes periodically.

venue

Place available for an examination session or site where a graduation ceremony takes place. Each graduation venue is associated with a parent graduation location.

venue code

Identifies a venue.

verification

Review process if the financial aid office determines the accuracy of information provided on the student's financial aid application. During the verification process, the student and parent are required to submit documentation for the amounts on the financial aid application. Examples include signed copies of the most recent federal and state income tax returns for the student, the student's spouse if applicable and the student's parents, proof of citizenship, proof of registration with Selective Service, and copies of Social Security benefit statements. Financial aid applications are randomly selected by the federal processor for verification, with most schools verifying at least one third of all applications. An asterisk next to the expected family contribution figure on a Student Aid Report (SAR) indicates that the SAR has been selected for verification. Schools might select additional students for verification if they suspect fraud. Some schools undergo 100% verification. If any discrepancies are uncovered during verification, a student's final financial aid package might vary from the initial package described on the award letter received from the school. If a student refuses to submit the required documentation, the financial aid package is cancelled and no aid is awarded.

veteran

For federal financial aid purposes, such as determining dependency status, a veteran is a former member of the U.S. Armed Forces, for example, Army, Navy, Air Force, Marines, or Coast Guard, who served on active duty and was discharged dishonorably, that is received an honorable or medical discharge. A person is a veteran even if they serve one day on active duty and that does not include active duty for training, before receiving DD-214 and formal discharge papers. ROTC students, members of the National Guard, and most reservists are not considered veterans. Having a DD-214 does not necessarily mean that a student is a veteran for financial aid purposes.

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 a student's request.

W2 form

Form listing an employee's wages and taxes withheld. Employers are required by the IRS to issue a W2 form for each employee before February 28.

work study

See *federal work study*.

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

A calculated value used to evaluate a student's 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.

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