

PeopleSoft v9.2 Campus Solutions Student Financials & Financial Aid (In Depth)

Training Agenda

DAY 1

Tuition and Fee Calculations Student Financials Foundation

- Tuition and Fees
 - Campus Solution components
 - Set up for calculating tuition, minimum and maximum fees
 - Course fees, criteria, tuition groups and waivers
 - Term and session tables, calendars & scheduling classes
 - Adding & activating students
 - Calculating tuition and fees
 - Transaction and optional fees
 - Self-service miscellaneous purchases
 - Population selection update process
 - Student Financials Self Service

- Student Financials Foundation
 - Setting up item types & using keywords to search for item types
 - Securing Student Financials
 - Creating charge priority lists
 - Setting up global invoicing
 - Implementing payment swapping

DAY 2

Managing Payment Process

- Receivables
 - Posting parameters in business units
 - Workflow notifications
 - Groups types and origins
 - Posting functionality

- Financial Aid
 - Manual process of awarding financial aid
 - Passing anticipated aid & disbursing financial aid
 - Global disbursement rules
 - Batch authorization and disbursement

- Customer Billing
 - Preparing for billing
 - Payment applier

- Service Indicators

- Refunds
 - Process & Rules definition
 - Payroll and AP refunding rules
 - Student online and batch refunds

DAY 1

Set up & Managing Data from External Sources

- Financial Aid Year
 - Academic Structure for Financial Aid Processing
 - School Code Setup
 - Processing Defaults & Aid Year Rollover
- ISIR Load Process
 - Preparing Students for Financial Aid Processing
 - Loading ISIR Data into Staging Tables
 - ISIR Corrections Component
 - INAS Simulation
 - Sending ISIR Corrections to CPS
 - ISIR Record Cleanup
- NSLDS Load Process
 - Describing the PROFILE and Need Access Data Load Process
 - Describing Institutional Application Maintenance
- Financial Aid Terms
 - Sources Used to Build Financial Aid Terms
 - Setting Up & Building Financial Aid Terms
- Student Budgets
 - Budget Components & Groups
 - Manual, Online & Background Budget Assignments
- Creating Disbursement Plans and Split Codes

DAY 2

Financial Aid Packaging & Disbursement

- Financial Aid Item Types
 - Student Financials Setup that Affects Financial Aid
 - Aggregate Aid & Loan Fees
 - Fiscal Item Types
 - Award Messages
- Defining Packaging Plans
 - How to Approach Packaging
 - Equations in Packaging
 - Using Packaging Plans
- Financial Aid Packaging
 - Manually awarding Financial Aid
 - Auto Packaging
 - Professional Judgment Decisions
 - Special Packaging Cases
 - Expiring Anticipated Aid
 - Manipulating Multiple Awards at a Time
 - Setting up Financial Aid Self Service
- Satisfactory Academic Process
 - Setting up SAP
 - Monitoring SAP
- Financial Aid Disbursement
 - Authorization and Disbursement Process
 - Disbursement Rules
 - Running Disbursement for One Student
 - Setting up & Running Batch Disbursement