Assessing Tuition

When students enroll in, add, or drop classes; a Tuition Calculation must be run to update their account. This can happen in

1. batch processing nightly;
2. when a student inquires on their account on-line;
3. when a staff person inquires on the account; or
4. when a staff person calculates the student’s tuition manually.

Regardless, to see the end-results of the calculation, you may navigate to the Tuition Calc page.
Entering a partial name will produce a list of results from which you can choose. Searching by name must be done carefully to prevent a lengthy search time. It is best to enter as much of the name as possible. For those students with common names such as Smith or Jones, it is best to enter as much of their First Name as possible.

1. Notice that at the top of the page underneath the dark blue line is **Academic Career**.
2. For students who have multiple Careers, you may have to navigate between them using the buttons to the right on the dark blue line.
3. Within each Career, you may see multiple **Terms**. To navigate between the different Terms, you will use the buttons to the right on the lighter blue line.
4. If the student has any Service Indicators on his/her account, you will see them in the upper right-hand corner of the page.

From here, you can see the student’s **Primary Program** for this Career. You can also see the student’s Billing Career, etc.

5. To determine whether changes have been made to the student’s enrollment, student group, or waiver status you can verify that the **Tuition Calc Required** box is checked. If it is, you will need to click on the yellow “Calculate Tuition and Fees” button at the bottom left-hand corner of the page.
6. You can also determine when the last time the Tuition Calc was processed on this student by viewing the **Tuition Calc Date Time** field in the bottom right-hand corner of the page. If you’ve just processed it using this page, you will see the **Tuition Calc Date Time** field update to the current date and time and the **Tuition Calc Required** box will be unchecked.
For student's who have multiple **Academic Careers**, you may have to navigate between them using the buttons to the right on the dark blue line. The Careers are sorted in alphabetical order. (See “1 of 2” above). Or you may click on “View All” to view all careers and then use the scroll bar to view.

Within each Career, you may see multiple **Terms**. To navigate between the different Terms, you will use the buttons to the right on the lighter blue line. Terms are sorted in descending order within each career. Or you may click on “View All” to view all careers and then use the scroll bar to view.

Note: If you have had to navigate to the Career and/or Term that was not on top when you brought up the page, the Tuition Calc process will refresh the page and you must re-navigate to the Career and Term you calculated for before being able to view the results.
Potentially, you could have 3 Terms and various Careers active at the same time where enrollment activity is occurring. This could mean that all three Terms could require a Tuition Calc (box checked).

At times setup changes will occur that may affect a student’s assessment that will not check the Tuition Calc Required box. For example, a class fee may have been added after the student enrolls. This will require that each student in the class be recalculated to ensure that the fee is assessed. A batch Tuition Calc runs weekly that will re-assess all students to ensure that no setup changes have been overlooked.

To view the results of the assessment, regardless of how or when it was calculated mouse-click on the “Display Tuition and Fees” link (Medicine Career, 4066 term):

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Notice there are tabs along the top for more information. In this view, only the Item Types with amounts greater than zero are displayed.

The Tuition and Fees 3 tab displays Refund/Adjustment information. If a Drop/Withdrawal Reason was selected, it will display on this panel. Otherwise, you can assume the default reason of “Student Requested”. Also keep in mind, the Refund Percent will only reflect the latest Adjusted Assessment. If the student dropped during the 90% Refund Period and then dropped another class within the 50% Refund Period, only the latest Refund Percent will show, even though the calculation results will also include the 90% Refund. This means that to accurately determine the student’s Refund/Adjustment activity, you will need to review the student’s enrollment activity (outlined in the next section).
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Drop and withdraw reasons and codes shown in these two columns.
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From the Tuition Calc panel, you can also review the student’s Academic Data:

Drill down on the “Academic Information” link.

At a glance, you are able to determine the number of hours of enrollment for each semester as well as a running total of the number of units within each Career the student has taken. In addition, you can easily review the student’s Residency, Academic Level and Academic Load.
Academic Plan and Sub-plan information can be located by drilling down on the “Academic Plan” link.

To review the student’s enrollment, including add and drop information, drill down on the “Enrollment” Link. The exceptions that will not appear on this link includes classes that the student has withdrawn from or dropped before the Term began as well as classes that the student “cancelled” out of using the Term History page.

The class information displays in two lines per class. The Add Date (on the top line) and the Drop Date (will appear on the bottom line below the Add Date) are on the far right hand side of the panel.

The Class Instructor and Meeting Room information can be seen by drilling down on the “Class Info” link.
Reviewing a Student’s Account

There are a couple of ways to review the transactions on a student’s account; one option is to use the “Display Student’s Accounts” link from the Tuition Calc panel. The other option, discussed in another document, is found by navigating to View Customer Accounts.

There may be several Account Types listed under this link (Housing, Miscellaneous Department, Health Services, Late Payment Fees, Library Fees, etc.). The Tuition and Fees will be listed by Term. The Balance displayed is the outstanding balance, the net of charges, payments, etc.

Notice there is not a balance of the entire student account displayed. To review the details, drill down on the “Account Details” link.
From this view, you can see the total Debits (All Charges) and Credits (Payments, Financial Aid, Waivers, etc.) that have been posted to the student’s account. Note: Some credits may be prevented from applying to specific charges, therefore, a balance may appear in the “Unapplied” field. An example of this would be Financial Aid that is not allowed to pay for certain fees (Edwards Campus Construction, MBA Fees, etc.). Most unapplied credits will be refunded within a week, depending upon refund rules. Otherwise, credits will show up in the “Applied” field.

To review specific charges, look in the lower section of the panel underneath the dark blue line. You may have to click the “View All” button or navigate using the buttons on the far right of the dark blue line if there are several lines of data on this panel. Please take note of the section that currently reads “1-10 of 10”, it will indicate how many total item lines exist (ex. “1-10 of 25”).

The **Item Type** column will display a description of the charge or credit. This is the same description that will show up on the student’s bill.

The **Term** column will show what term the credit or debit is associated with. Note: Credits could potentially be applied from prior or future terms based on whether the student had an old credit balance, or has posted a future payment that must pay off the current balance first.

The **Item Number** column displays the unique number that PeopleSoft has assigned each item within the student account. This is mainly used by the Bursar’s Office for reporting purposes as well as researching potential problems.

The **Amount** column represents the amount of the item posted.

The **Balance** column represents how much of the item is still outstanding (unpaid amount for charges; unapplied amount for credits).

**Not shown** besides the over-all balance, are the links to Detail information for each charge or payment; links to different sorts of the data; link for Payment Plans; Anticipated Aid information as could be found on the View Customer Account.