

## PeopleSoft Campus Solutions 9.2 Student Financials & Financial Aid (In-depth)

4-Day Course

## DAY 1 – Student Financials

### Set up & Managing Data from External Sources

### 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 – Student Financials

### 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 – Financial Aid

### 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

### 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